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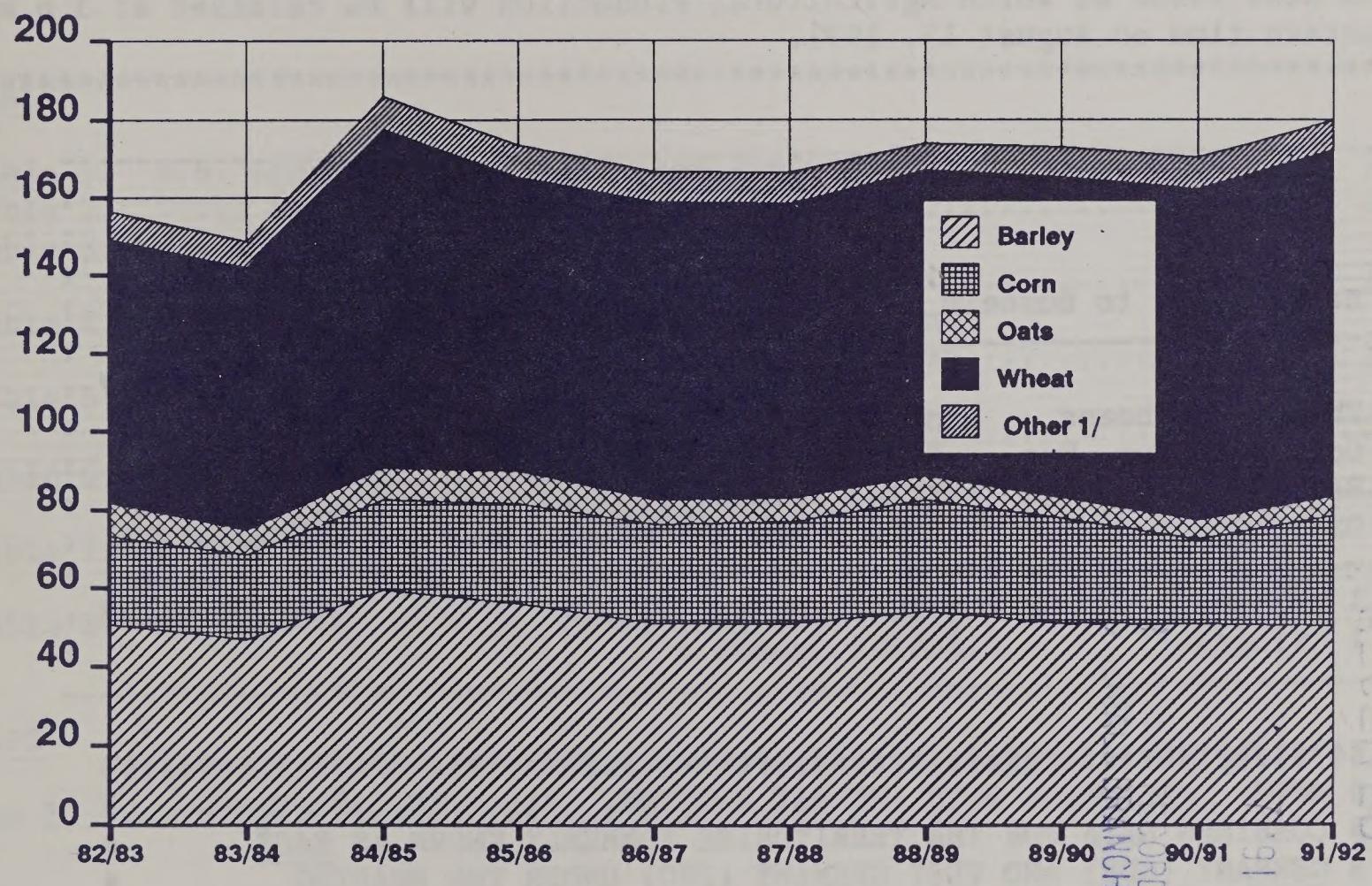


United States  
Department of  
Agriculture  
Foreign  
Agricultural  
Service  
Circular Series  
WAP 7-91  
July 1991

# World Agricultural Production

## EC-12 Grain Production

Million Metric Tons



1/Other includes rye, sorghum, mixed grains, and milled rice.

### Production Articles This Month...

**EC Grain Overview**

**World Cotton Outlook**

**Tomatoes for Processing**

**Israeli Oilseeds**

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-256), July 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

\*\*\*\*\*  
\* The next issue of World Agricultural Production will be released at 3 p.m. \*  
\* eastern time on August 13, 1991. \*  
\*\*\*\*\*

#### CONVERSION TABLE

: Metric Tons to Bushels	: Metric Tons to 480-lb. Bales
: -----	: -----
: Cotton	= MT*4.592917
: Wheat & Soybeans = MT*36.7437	:
: Corn, Sorghum, Rye = MT*39.36825	:
: Barley = MT*45.929625	:
: Oats = MT*68.894438	: Metric Tons to Hundredweight
: -----	: -----
: 1 hectare = 2.471044 acres	: Rice = MT*22.04622
: 1 kilogram = 2.204622 pounds	:

#####  
# NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES #  
# COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST #  
# GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING #  
# GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED #  
# EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN #  
# COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN #  
# EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, #  
# AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH #  
# DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND #  
# MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER #  
# PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE. #  
#####

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## PRODUCTION HIGHLIGHTS FOR 1991/92

July 1991

**WHEAT:** World production for 1991/92 is estimated at 556.1 million tons, up 3.3 million or 1 percent from last month, but down 6 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 55.3 million tons, up 0.2 million from last month, but down 26 percent from last year. The increase is due to higher estimated spring wheat area and yield.
- o Canada Production is estimated at 29.0 million tons, up 2.9 million or 11 percent from last month, but down 9 percent from last year. Continued favorable weather resulted in higher estimated yield.
- o Eastern Europe Production is estimated at 39.0 million tons, up 1.0 million or 3 percent from last month, but down 5 percent from last season. The decline is due to reduced area and yields in Romania.
- o EC-12 Production is estimated at 88.8 million tons, up 0.9 million or 1 percent from last month and up 5 percent from 1990/91. Favorable weather increased yield prospects in Germany, Italy, and Greece while continued warmer and drier-than-normal weather adversely affected the crop in Spain.
- o Turkey Production is estimated at 16.0 million tons, up 0.5 million or 3 percent from last month's estimate and up 7 percent from last year. The increase is due to cooler-than-normal temperatures and above normal rainfall throughout the producing areas.
- o Morocco Production is estimated at 4.6 million tons, up 0.5 million or 13 percent from last month and up 28 percent from 1990/91. Although planted area for both durum and soft wheat is slightly lower than last year, yield prospects have improved by 30 percent.
- o Saudi Arabia Production is estimated at 4.0 million tons, up 0.3 million or 7 percent from last month and 11 percent from last year. High guaranteed prices and prompt payment by the government enabled producers to purchase the required inputs.

- o Soviet Union Production is estimated at 92.0 million tons, down 2.0 million or 2 percent from last month and down 15 percent from last year. The decrease from last month is due to reduced yield estimates in the spring grains area.
  - o Pakistan Production is estimated at 14.5 million tons, down 0.5 million or 3 percent from last month, but up 1 percent from last year's harvest. Wheat yields were reduced in Punjab Province due to widespread rains during the final grain filling stage and at early harvest. Wheat area remained unchanged at a record 7.96 million hectares.
  - o South Africa Production is estimated at 2.0 million tons, down 0.4 million or 17 percent from last month, but up 18 percent from last year. Late rains in the Cape and Free State reduced both area and yield prospects.
- COARSE GRAINS:** World production for 1991/92 is estimated at 828.0 million tons, up 1.9 million or less than 1 percent month and up less than 1 percent from last year. Country highlights are as follows:
- o United States Production is estimated at 240.9 million tons, up 0.6 million, a slight increase from last month and up 4 percent from last year. The increase is due to higher barley production which is only partially offset by a decrease in oat production.
  - o Canada Production is estimated at 24.4 million tons, up 1.5 million or 6 percent from last month, but down 6 percent from last year. An increase in barley area and yield offset a decline in oats.
  - o Eastern Europe Production is estimated at 58.0 million tons, up 1.2 million or 2 percent from last month and up 11 percent from last year's drought-reduced harvest. Increased production in Romania resulted from favorable weather, altered labor patterns, and producer incentives.
  - o EC-12 Production is estimated at 89.5 million tons, up 0.7 million or 1 percent from last month and up 7 percent from last year. An increase in barley production in France and Germany is expected to offset a decrease in prospective barley output in Spain. With the exception of the Iberian Peninsula, favorable weather increased yield prospects.

- o Morocco Production is estimated at 2.8 million tons, up 0.6 million or 24 percent from last month and up 30 percent from last year. Abundant rainfall since mid-February has improved yield prospects for barley.
- o Zambia Production is estimated at 1.3 million tons, up 0.5 million or 53 percent from last month and 44 percent above last year's drought reduced crop. Beneficial late season rains increased yields.
- o Turkey Production is estimated at 9.7 million tons, up 0.3 million or 3 percent from last month's estimate and up 9 percent from last year's harvest. The increase is based on favorable weather which improved barley production prospects.
- o Soviet Union Production is estimated at 99.5 million tons, down 3.0 million or 3 percent from last month and down 12 percent from last year. The decrease is due to yield reductions for barley and oats.

**RICE (MILLED-BASIS):** World production for 1991/92 is projected at 344.2 million tons, down 3.8 million or 1 percent from last year's record crop. Foreign production in 1991/92 is projected at 339.2 million tons, a decrease of 3.7 million or 1 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 5.0 million tons, down 0.1 million or 3 percent from last year's level.
- o China Production is estimated at 126.0 million tons, down 3.5 million or 3 percent from last year's record crop. Rice area is expected to decrease by 500,000 hectares as farmers shift to other crops because of unusually large stocks and declining prices. Yields are forecast slightly lower in 1991 due to reports of severe weather in parts of China's rice production area.
- o India Production is estimated at 73.0 million tons, down 2.0 million or 3 percent from last year's record harvest. Rice area is forecast to decline less than 1 percent, while yields are estimated slightly below last year's record level. Three consecutive bumper grain harvests are expected to limit the growth of crop returns to rice farmers.

- o Vietnam Production is estimated at 11.4 million tons, down 0.3 million or 3 percent from 1990/91. Inadequate supplies of fertilizer and reduced area account for the decline.
- o Nepal Production is estimated at 2.0 million tons, down 0.3 million or 13 percent from 1990/91's record harvest. Normal rainfall during the monsoon growing season is expected to cause crop yields to return to near average levels.
- o Indonesia Production is estimated at 29.0 million tons, down 0.2 million or 1 percent from 1990/91. After two successive record crops, delays in planting caused by the late onset of rains plus delays in harvesting due to excessively wet conditions caused a reduction in yields.
- o Thailand Production is estimated at 13.2 million tons, up 1.8 million or 16 percent from 1990/91. An increase in area and return to normal yields will boost production. To date there have been no reports of significant brown plant hopper damage that hurt last year's main season crop.
- o Brazil Production is estimated at 6.8 million tons, up 0.5 million or 8 percent from 1990/91. The production increase is due to a return to near average area and continued favorable yield prospects.
- o Egypt Production is estimated at 2.1 million tons, up 0.3 million or 17 percent from last year. Adequate irrigation supplies coupled with production and marketing reforms resulted in record production during the 1990/91 crop season. Rice yields and area planted are expected to continue their upward trend.
- o Bangladesh Production is estimated at a record 18.0 million tons, up 0.2 million or 1 percent from 1990/91's cyclone affected harvest. Rice area is forecast to remain unchanged from last year, while yields are forecast to improve slightly barring any major flood or cyclonic damage.
- o Pakistan Production is estimated at 3.2 million tons, up 0.1 million or 2 percent from last year. Crop area is estimated up 1 percent, with rice yields forecast at average levels. Rice area and yields have shown little variation over the last 15 years, with the 1991/92 growing season following the same trend.

**OILSEEDS:** Total world oilseeds production during 1991/92 is forecast at a record 223.8 million tons, up 6.0 million or 3 percent from 1990/91. Foreign production is forecast to be a record 160.5 million tons, up 3.3 million or 2 percent from last year. U.S. total oilseed production is forecast at 63.2 million tons, up 2.8 million or 4 percent from last year.

- \* **Soybeans:** World production for 1991/92 is forecast at 107.0 million tons, up 3.4 million or 3 percent from last year. Total foreign soybean output is forecast at 53.4 million tons, up 2.1 million or 4 percent from 1990/91. Country highlights are as follows:

- o **United States** Production is estimated at 53.6 million tons, up 1.3 million or 3 percent above last year. The increase is due to higher estimated area.
- o **EC-12** Production is estimated at 1.8 million tons, down 0.4 million or 16 percent from 1990/91. Reduced area in Italy, the EC's major producer, accounts for the decline.
- o **Paraguay** Production is estimated at 1.6 million tons, up 0.3 million or 23 percent from 1990/91. The increase is attributed to higher yields than last year's drought affected crop.
- o **Brazil** Production is forecast at 17.5 million tons, up 2.0 million or 13 percent from last year. The increase in production is due to expectations for a partial recovery in planted area and a return to near normal yields.
- o **Argentina** Production is estimated at 10.8 million tons, down 0.2 million or 2 percent from the record production and near-record yields in 1990/91. The decrease is based on anticipated average yield.
- o **China** Production is estimated at 11.5 million tons, up 0.1 million or 1 percent from last year. Harvested soybean area is expected to increase in 1991.
- o **India** Production is estimated at 2.4 million tons, unchanged from last year's record harvest. Soybean area is forecast to rise 4 percent, continuing the expansion of this non-traditional oilseed in central India, but will be offset by a lower yield.

- \* **Cottonseed**: World production for 1991/92 is forecast at 35.0 million tons, up 1.6 million or 5 percent from last year. Total foreign production is forecast at 29.3 million tons, up 1.2 million or 4 percent from last year. Country highlights are as follows:
  - o **United States** Cottonseed production is estimated at 5.8 million tons, up 0.3 million or 6 percent from 1990/91. The estimate is based on increased area for harvest.
  - o **China** Production is estimated at 8.5 million tons, up 0.8 million or 11 percent from last year. Cotton area is expected to increase as farmers shift from grain to cotton production because of higher relative prices.
  - o **India** Production is estimated at 4.2 million tons, up 0.2 million or 5 percent from last year. Harvested area is forecast to rise by 3 percent owing to relatively high cotton lint prices, strong domestic cotton demand, and continuing favorable returns to growers.
  - o **Brazil** Production is forecast at 1.4 million tons, up 0.1 million or 8 percent from last year. The production increase is due to improved yield prospects. The 1990/91 cotton crop was negatively impacted by dry weather during the growing season.
  - o **Egypt** Production is projected at 0.6 million tons, down 0.1 million or 10 percent from last year. Cottonseed production is expected to continue its decline, reducing the 1991/92 crop to near record low levels.
  - o **Pakistan** Production is estimated at a record 3.4 million tons, up 0.1 million or 3 percent from last year. Harvested area is forecast at a record, owing to strong price incentives relative to competitor crops.
  - o **Turkey** Production is estimated at 0.8 million tons, down 0.1 million or 14 percent from last year. The decrease is due to reduced area.

- \* **Peanuts:** World production for 1991/92 is forecast at 22.5 million tons, up 0.4 million or 2 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, down 0.1 million or 1 percent from last year. Country highlights are as follows:
  - o **United States** Production is estimated at 2.1 million tons, up 0.5 million or 31 percent from last year. Yield is expected to recover from last year's level and area is estimated up 9 percent from 1990/91.
  - o **China** Production is estimated at 5.8 million tons, down 0.6 million or 9 percent from last year's unusually large crop. An increase in area is expected to be offset by a return to average yield.
  - o **India** Production is estimated at 7.6 million tons, up 0.3 million or 4 percent from last year's drought-affected crop. Peanut area is forecast to rise 2 percent owing to strong price incentives. Peanut yields are expected to rebound to near average levels.
- \* **Sunflowerseed:** World production for 1991/92 is forecast at 21.6 million tons, down 0.4 million or 2 percent from 1990/91. Total foreign production is forecast at 20.1 million tons, down 0.9 million or 4 percent from last year. Country highlights are as follows:
  - o **United States** Production is estimated at 1.5 million tons, up 0.5 million or 47 percent from last year. In addition to an improved outlook for average yield over last season, harvested area is expected to be up 37 percent from 1991/92.
  - o **Argentina** Production is estimated at 3.5 million tons, down 0.4 million or 10 percent from near-record production and record yields in 1990/91. An increased area is expected to be offset by lower yields.
  - o **EC-12** Production is estimated at 3.8 million tons, down 0.3 million or 8 percent from 1990/91. Reduced area, primarily in Spain and France, accounts for the decline.
  - o **Soviet Union** Production is estimated at 6.8 million tons, up 0.2 million or 4 percent from last year. A small increase in harvested area is expected to be bolstered by a marginal improvement in average yield from 1990/91.

- o Turkey Production is estimated at 0.7 million tons, down 0.2 million or 24 percent from last year. Reduced plantings after rains in June dampened prospects for the 1991/92 crop.
- \* Rapeseed: World production for 1991/92 is forecast at a record 27.1 million tons, up 1.3 million or 5 percent from last year. Country highlights are as follows:
  - o Canada Production is estimated at 4.2 million tons, up 0.9 million or 26 percent from 1990/91. An increase in area and good yield potential is expected to result in Canada's second largest rapeseed crop.
  - o EC-12 Production is estimated at 7.1 million tons, up 0.9 million or 14 percent from last year. German farmers have planted more rapeseed in response to improved crop security, rising average yields, and higher profitability. Favorable weather throughout most of the EC rapeseed area has improved yield prospects.
  - o India Production is estimated at 5.0 million tons, down 0.7 million or 13 percent from last year's record harvest. Rapeseed area is forecast to expand by 2 percent in 1991/92, while crop yield is expected to return to near average levels.
  - o China Production is estimated at a record 7.1 million tons, up 0.1 million or 2 percent from last year. Farmers responded to higher prices by expanding area and, with favorable weather during the growing season, yields are forecast to increase.
  - o Eastern Europe Production is estimated at 1.7 million tons, down 0.1 million or 4 percent from last year. Harvested area is forecast to decrease 8 percent from last year, while yields are estimated to decrease by 4.2 percent.
- \* Flaxseed: World production for 1991/92 is forecast at 2.1 million tons, down 0.2 million or 10 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 0.3 million or 11 percent from last year. Country highlights are as follows:
  - o Canada Production is estimated at 0.6 million tons, down 0.3 million or 33 percent from last year. A drop in area, partly as a result of large carry-over stocks, and an expected reduction in yield account for the decline.

- o EC-12
  - Production is estimated at 168,000 tons, up 53,000 or 46 percent from last year. Stimulated by high EC area subsidies, production in the United Kingdom is expected to double.
- \* Copra: World production for 1991/92 is forecast at 4.8 million tons, down 165,000 or 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. Country highlights are as follows:
  - o Philippines Production is estimated at 2.0 million tons, down 0.2 million or 10 percent from 1990/91. After two years of increasing output, coconut trees are expected to undergo a cyclical downturn in fruit production.
- \* Palm Kernels: World production for 1991/92 is forecast at a record 3.6 million tons, up 7 percent from last year. Country highlights are as follows:
  - o Malaysia Production is estimated at 2.0 million tons, up 0.2 million or 9 percent from last year. The increase is attributed to an expected rise in oil palm output.
- \* Palm Oil: World production for 1991/92 is forecast at a record 11.9 million tons, up 0.8 million or 7 percent from last year. Country highlights are as follows:
  - o Malaysia Production is estimated at 6.6 million tons, up 0.5 million or 8 percent from 1990/91. Yields are expected to rebound from last year's decline.
  - o Indonesia Production is estimated at 2.7 million tons, up 0.2 million or 8 percent from 1990/91. Increased area, good weather, and maturing trees are expected to boost output.
- COTTON: World cotton production in 1991/92 is projected at a record 90.3 million bales. The estimate is down 0.4 million bales or 1 percent from last month but up 3.7 million bales or 4 percent from 1990/91 and 2 percent above the previous record of 89 million bales harvested in 1984/85. Total foreign production is projected at 74.1 million bales, down 0.6 million or 1 percent from last month, but represents a gain of 4 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:
  - o United States Production is estimated at 16.2 million bales, up 0.2 million or 1 percent from last month and up 5 percent from last year. This would be the largest crop since 1953/54 when output hit 16.4 million bales. Due to late planting and/or replanting, cotton development is behind normal and last year, but conditions are improving.

- o China

Production is estimated at 22.5 million bales, up 1.8 million or 9 percent from last year. Cotton area is expected to increase by 9 percent to 6.1 million hectares in response to relatively high cotton prices and generous government production incentives. Weather for the 1991 crop has been generally favorable in northern production areas, but heavy rain and flooding during June may have damaged the crop between the Huai and Yangtze River valleys.
- o India

Production is estimated at 10.0 million bales, up 0.8 million or 9 percent from last year's disappointing crop. Cotton yields are forecast to rebound to near average levels this year. Cotton area is forecast to increase 3 percent due to high domestic prices, expectation of increased government support prices, and high domestic and export demand.
- o Brazil

Production is projected at 3.5 million bales, up 0.4 million or 13 percent from last year. The 1991/92 crop yields are forecast to recover from last year's weather-reduced levels. Area is expected to remain virtually unchanged.
- o Pakistan

Production is estimated at a record 7.8 million bales, up 0.3 million or 4 percent from last year's record harvest. Cotton area and yields are forecast above 1990/91 levels, as strong domestic demand is expected to influence growers to expand production and use higher levels of crop inputs.
- o Mexico

Production is forecast to increase to 1.0 million bales, up 0.2 million bales or 28 percent above last year's weather-damaged crop. Area is estimated up 40 percent with the largest increase in non-irrigated areas. Strong international prices have led to increased area.
- o USSR

Production is estimated at 11.5 million bales, down 0.5 million or 4 percent from last year. Area is forecast down 3 percent as land was shifted into feed and produce production. The growing season is generally favorable with adequate irrigation water and normal temperatures.
- o Turkey

Production is estimated at 2.5 million bales, down 0.3 million or 11 percent from last year's production. Harvested area is forecast to decrease to 0.6 million hectares. Yields are expected to decrease. Factors contributing to the expected lower yields include rains in early June that reduced and/or delayed planting.

- o Egypt

Production is forecast at 1.3 million bales, down 0.1 million or 6 percent from last year. The outlook for the 1991/92 cotton crop is uncertain. Planted acreage is projected to decrease moderately as producers respond to a new government policy aimed at removing marginal land from cotton.
- o Australia

Production is estimated at 1.7 million bales, down 0.1 million or 3 percent from last year's record crop. Cotton area is forecast to rise 4 percent, owing to cotton's favorable price situation in regards to competitor crops. However, yields are forecast down as dryland area should expand over 1990/91 levels.
- o Argentina

Production is estimated at 1.3 million bales, down slightly from last year. Area is forecast to decrease 6 percent due to a shortage of credits and poor returns from last year's crop. Yields are expected near average.

TABLE 1  
U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	1991/92 Proj.	Prel.	1990/91	June	July
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	1989/90	1990/91	June	July
<b>--Million Acres--</b>												
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5	35.0	2,037	2,739	2,024
Winter	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	36.0	1,455	2,033	1,449
Other	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4	23.9	582	705	575
Rye	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	27.6	14	10	12
Soybeans	60.8	57.8	59.5	56.5	59.5	56.5	32.3	34.0	32.3	1,924	1,922	1,875
Corn	72.2	74.2	64.7	67.0	67.0	64.7	116.3	118.5	116.3	7,525	7,933	8,275
Sorghum	12.6	10.5	11.1	9.1	9.1	9.1	55.4	62.9	55.4	615	571	640
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9	48.6	404	419	425
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1	54.3	56.3	374	357
<b>--Bushels per Acre--</b>												
Rice	2.7	2.9	2.7	2.8	2.7	2.8	5,749	5,507	5,749	154.5	154.9	154.0
All Cotton	10.6	12.4	9.5	11.7	9.5	11.7	614	634	614	12.2	15.5	16.0
<b>--Pounds per Acre--</b>												
<b>--Million CWT--</b>												
<b>--Million 480-Pound--</b>												

1/Estimates from USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and wheat, barley, and oats forecast for 1991/92.  
All other 1991/92 projections are from USDA Interagency Commodity Estimates Committees.

TABLE 2

## World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			Asia			South America			Selected Other			All Other Countries					
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe	USSR	China	India	Indonesia	Pakistan	Thailand	Argentina	Brazil	Australia	South Africa	Turkey				
—Million Metric Tons—																							
<u>Wheat</u>			537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4	
1989/90	593.5	518.9	74.5	31.8	3.9	84.8	5.1	41.1	108.0	49.7	0.0	14.3	0.0	0.0	11.0	3.1	15.4	1.7	15.0	1.7	15.0	18.1	
1990/91 prel.																							
1991/92 proj.	552.8	497.7	55.1	26.1	3.5	88.0	4.1	38.0	94.0	95.0	54.0	0.0	15.0	0.0	10.0	4.0	12.0	2.4	15.5	17.3	17.3	17.6	
June	556.1	500.8	55.3	29.0	3.5	88.8	4.1	39.0	92.0	95.0	54.0	0.0	14.5	0.0	10.0	4.0	12.0	2.0	16.0	12.0	16.0	17.6	
July																							
<u>Coarse Grains</u>			798.5	578.1	221.4	23.5	14.1	89.6	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	78.8	
1989/90	825.2	594.6	230.6	26.0	17.3	83.9	13.6	52.3	113.3	106.0	35.0	5.3	2.9	4.0	11.2	24.2	6.9	7.6	8.9	7.6	8.9	76.4	
1990/91 prel.																							
1991/92 proj.	826.1	585.8	240.4	23.0	16.0	88.8	12.2	56.8	102.5	98.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.4	8.6	9.7	79.8	
June	828.0	587.1	240.9	24.4	16.0	89.5	12.2	58.0	99.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	8.6	9.7	80.5	
July																							
<u>Rice (Milled)</u>			344.0	338.9	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	0.2	23.1
1989/90	348.1	343.0	5.1	0.0	0.2	1.6	0.0	0.1	1.6	129.5	75.0	29.2	3.1	11.4	0.2	6.3	0.5	0.5	0.0	0.2	0.2	23.7	
1990/91																							
1991/92 proj.	345.9	341.0	4.9	0.0	0.3	1.5	0.0	0.1	1.7	126.0	73.0	29.0	3.2	13.2	0.2	6.8	0.6	0.0	0.2	0.2	0.2	23.4	
June	344.2	339.2	5.0	0.0	0.3	1.5	0.0	0.1	1.7	126.0	73.0	29.0	3.2	13.2	0.2	6.8	0.6	0.0	0.2	0.2	0.2	23.4	
July																							
<u>Total Grains 1/</u>			1,681.1	1,399.2	281.9	48.0	18.5	173.0	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	192.9	
1989/90	1,768.7	1,458.5	310.2	57.8	21.4	170.3	18.7	93.5	222.9	333.5	159.6	34.5	20.3	15.4	22.5	33.6	22.9	9.3	24.1	9.3	24.1	198.3	
1990/91 prel.																							
1991/92 proj.	1,724.8	1,424.5	300.4	30.4	53.4	19.8	179.8	16.3	97.2	193.2	320.4	160.0	34.6	20.1	17.3	20.3	37.5	20.0	10.6	25.9	200.8		
June	1,728.4	1,427.2	301.2	53.4	19.8	179.8	16.3	97.2	193.2	320.4	160.0	34.6	20.1	17.3	20.3	37.5	20.0	10.6	25.9	200.8			
July																							
<u>Oilseeds 2/</u>			214.0	154.7	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5	
1989/90	217.7	157.2	60.5	5.7	1.0	13.0	0.7	4.3	13.0	33.6	20.4	2.2	3.6	0.7	16.3	17.0	2.0	1.0	1.9	1.0	1.9	20.5	
1990/91 prel.																							
1991/92 proj.	223.0	162.5	60.5	63.2	6.3	1.1	13.2	0.7	4.2	13.4	34.1	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	1.6	22.3	
June	223.8	160.5	63.2	6.3	1.1	13.2	0.7	4.2	13.4	34.1	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	1.6	22.3		
July																							
<u>Cotton</u>			80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5	
1989/90	86.6	71.1	15.5	0.0	0.8	1.4	0.0	0.1	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.8	0.2	2.9	10.1		
1990/91 prel.																							
1991/92 proj.	90.7	74.7	16.0	0.0	1.0	1.3	0.0	0.1	11.5	22.5	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.4			
June	90.3	74.1	16.2	0.0	1.0	1.3	0.0	0.1	11.5	22.5	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.4			
July																							
—Million 480-Pound Bales—																							

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 205.0 million forecast in 1991/92.  
 2/ Totals for major regions and countries include the six major oilseeders shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.  
 Note: Entries of 0.0 indicate no reported or insignificant production.

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TABLE 3  
**Wheat Area, Yield, and Production**  
**World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION					
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92	Proj. June	Proj. July	Prel. 1989/90	1990/91	1991/92	Proj. June	Proj. July
	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>					
World	225.5	231.1	224.4	2.38	2.57		2.48		537.6	593.5	552.8		556.1
United States	25.2	28.1	23.5	2.20	2.66		2.35		55.4	74.5	55.1		55.3
Total Foreign	200.3	203.0	200.8	2.41	2.56	2.48	2.49		482.2	518.9	497.7		500.8
Maj. Foreign Exporters	45.1	45.6	44.4	2.91	3.14	3.07	3.15		131.0	143.0	136.1		139.8
Argentina	5.5	5.9	5.3	1.86	1.86	1.89	1.89		10.2	11.0	10.0		10.0
Australia	9.0	9.2	8.0	1.58	1.67	1.50	1.50		14.2	15.4	12.0		12.0
Canada	13.6	14.0	14.1	1.80	2.27	1.86	2.06		24.6	31.8	26.1		29.0
EC-12	17.0	16.5	17.0	4.83	5.15	5.19	5.23		82.0	84.8	88.0		88.8
Major Importers	96.4	97.6	95.8	2.48	2.68	2.54	2.53		238.8	261.1	243.5		243.0
Brazil	3.4	2.7	2.6	1.65	1.16	1.54	1.54		5.6	3.1	4.0		4.0
China	29.8	30.8	30.8	3.04	3.18	3.11	3.08		90.8	98.0	95.0		95.0
Eastern Europe	9.8	9.8	9.8	4.14	4.18	3.86	4.00		40.7	41.1	38.0		39.0
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40		3.2	4.3	4.8		4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.28	1.40		5.3	5.6	6.8		7.3
Japan	0.3	0.3	0.2	3.47	3.66	3.46	3.51		1.0	1.0	0.9		0.9
USSR	47.7	48.2	46.5	1.94	2.24	2.02	1.98		92.3	108.0	94.0		92.0
Other Foreign	58.9	59.8	60.6	1.91	1.92	1.95	1.95		112.4	114.8	118.2		118.0
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22		54.1	49.7	54.0		54.0
Iran	6.0	6.2	6.2	0.92	1.13	1.03	1.03		5.5	7.0	6.4		6.4
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98		4.0	3.9	3.5		3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.01		4.4	5.1	4.1		4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.89	1.82		14.4	14.3	15.0		14.5
South Africa	1.8	1.7	1.9	1.11	1.00	1.26	1.08		2.0	1.7	2.4		2.0
Turkey	8.7	8.8	8.9	1.44	1.71	1.76	1.80		12.5	15.0	15.5		16.0
Others	8.7	10.0	9.7	1.76	1.81	1.78	1.81		15.4	18.1	17.3		17.6

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 June	Proj. July	Prel. 1989/90	Proj. 1990/91	1991/92 June	Proj. July
<b>TOTAL COARSE GRAINS</b>	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
World 1/	321.0	318.8		2.49	2.59			799.5	825.2	826.1	828.0
United States	37.0	36.4		5.98	6.34			221.4	230.6	240.4	240.9
Total Foreign	284.0	282.4	283.3	2.04	2.11	2.07	2.07	578.1	594.6	585.8	587.1
Maj. Foreign Exporters	21.3	20.9	21.7	2.46	2.66	2.47	2.51	52.5	55.7	53.1	54.5
Argentina	3.2	3.3	3.5	2.64	3.43	2.88	2.88	8.3	11.2	10.1	10.1
Australia	4.0	4.3	4.8	1.73	1.63	1.53	1.53	6.8	6.9	7.4	7.4
Canada	8.3	8.0	7.7	2.84	3.24	3.07	3.16	23.5	26.0	23.0	24.4
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	2.07	9.5	7.6	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	2.72	4.3	4.0	4.1	4.1
Major Importers	103.7	99.7	101.1	2.73	2.83	2.74	2.74	282.7	281.8	277.9	276.8
Eastern Europe	16.5	15.9	16.0	3.66	3.30	3.52	3.63	60.2	52.3	56.8	58.0
EC-12	20.2	19.2	19.3	4.43	4.37	4.61	4.65	89.6	83.9	88.8	89.5
Other W. Europe	3.1	3.0	3.0	3.97	4.47	4.10	4.10	12.4	13.6	12.2	12.2
Mexico	7.5	8.2	8.5	1.88	2.09	1.88	1.88	14.1	17.3	16.0	16.0
USSR	56.0	52.9	54.0	1.87	2.14	1.90	1.84	104.8	113.3	102.5	99.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	159.0	161.8	160.5	1.53	1.59	1.59	1.59	242.9	257.1	254.8	255.8
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.3	3.31	3.64	3.52	3.52	93.5	106.0	99.4	99.4
India	37.7	38.9	37.8	0.92	0.90	0.87	0.87	34.6	35.0	33.0	33.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.11	2.17	7.5	8.9	9.4	9.7
Others	59.8	59.7	59.6	1.13	1.12	1.13	1.15	67.3	66.7	67.6	68.3
<b>BARLEY</b>											
World	74.7	73.3		2.27	2.53			169.3	185.7	174.0	176.0
United States	3.4	3.0		2.62	3.00			8.8	9.1	9.3	10.4
Total Foreign	71.4	70.3	72.4	2.25	2.51	2.29	2.29	160.5	176.6	164.7	165.6
Australia	2.3	2.5	2.9	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.4
Canada	4.7	4.6	4.6	2.50	2.93	2.73	2.83	11.7	13.5	11.8	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.6	4.03	4.02	3.75	3.82	14.5	14.4	13.2	13.8
EC-12	12.6	12.3	12.1	4.05	4.13	4.13	4.16	51.0	50.8	49.6	50.3
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.91	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	1.91	2.00	4.9	6.0	6.5	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.86	1.79	48.5	61.0	53.0	51.0
Others	12.4	13.0	12.5	1.15	1.12	1.16	1.19	14.3	14.6	14.7	14.9

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

**TABLE 4**  
**Coarse Grains Area, Yield, and Production**  
**World and Selected Countries and Regions -- Continued**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. June July	Prel. 1989/90	Proj. 1990/91	1991/92 Proj. June July		
<b>CORN</b>	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
World	126.1	127.0		3.65	3.69		460.7	469.2	492.1	493.4	
United States	26.2	27.1		7.30	7.44		191.2	201.5	210.2	210.2	
Total Foreign	99.9	99.9	102.7	2.70	2.68	2.74	2.76	269.6	267.7	281.9	283.2
Maj. Foreign Exporters	6.7	6.4	6.9	2.72	2.89	2.75	2.75	18.2	18.5	19.0	19.0
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	2.35	8.9	7.0	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	2.88	4.1	3.7	3.8	3.8
Major Importers	21.2	19.6	21.9	3.93	3.46	3.80	3.89	83.3	67.8	84.5	85.2
Eastern Europe	7.1	6.4	6.6	4.14	3.29	4.00	4.29	29.2	21.1	27.8	28.3
EC-12	3.9	3.5	4.0	6.91	6.24	7.06	7.07	26.9	21.7	28.1	28.3
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	1.97	1.71	1.71	9.8	13.0	12.0	12.0
USSR	4.1	2.8	4.0	3.71	3.50	3.63	3.63	15.3	9.8	14.5	14.5
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	73.9	73.8	2.33	2.45	2.42	2.42	168.0	181.4	178.4	178.9
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	7.00	6.00	6.00	6.4	7.0	6.6	6.6
China	20.4	21.4	20.6	3.88	4.21	4.08	4.08	78.9	90.0	84.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.9	1.61	1.61	1.53	1.53	9.4	9.5	9.0	9.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.4	24.0	24.2	1.46	1.47	1.47	1.49	35.5	35.2	35.6	36.1
<b>SORGHUM</b>											
World	40.6	39.6		1.35	1.34			54.8	53.2	54.6	54.3
United States	4.5	3.7		3.48	3.95			15.6	14.5	16.3	16.0
Total Foreign	36.1	35.9	36.0	1.08	1.08	1.07	1.07	39.1	38.7	38.3	38.3
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	2.00	0.9	0.9	1.0	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	3.17	4.4	5.2	5.0	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	0.80	12.9	12.5	12.0	12.0
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.09	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. June July	Prel. 1989/90	1990/91	1991/92 Proj. June July		
<b>OATS</b>	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
World	22.7	21.6		1.84	1.98			41.9	42.7	40.2	.39.0
United States	2.8	2.4		1.95	2.16			5.4	5.2	4.4	4.1
Total Foreign	19.9	19.2	19.1	1.83	1.96	1.88	1.84	36.4	37.5	35.9	35.0
USSR	10.8	10.7	10.5	1.57	1.68	1.62	1.52	16.8	18.0	17.0	16.0
Maj. Foreign Exporters	3.7	3.3	3.4	1.97	2.14	2.01	2.10	7.3	7.2	6.9	7.2
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.22	2.44	3.5	3.5	3.0	3.3
Sweden	0.4	0.4	0.4	3.54	4.42	3.86	3.86	1.5	1.6	1.6	1.6
Other Foreign	5.5	5.1	5.1	2.24	2.41	2.34	2.30	12.3	12.3	12.0	11.8
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.64	2.56	3.2	3.3	2.9	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.70	2.2	2.1	1.9	1.9
EC-12	1.9	1.5	1.6	2.82	3.15	3.07	3.02	5.2	4.8	5.2	4.9
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.7	0.5	0.5	3.68	4.45	4.48	4.44	2.4	2.1	2.6	2.4
Finland	0.4	0.5	0.4	3.24	3.67	3.28	3.28	1.4	1.7	1.3	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
<b>RYE</b>											
World	16.9	16.7		2.22	2.32			37.6	38.9	30.5	30.6
United States	0.2	0.2		1.77	1.70			0.3	0.3	0.3	0.3
Total Foreign	16.7	16.6	13.4	2.23	2.33	2.25	2.27	37.3	38.6	30.2	30.3
USSR	10.7	10.4	8.0	1.87	2.02	1.81	1.81	20.1	21.0	14.5	14.5
Maj. Foreign Exporter											
Canada	0.5	0.5	0.3	1.74	1.74	1.71	1.69	0.9	0.9	0.6	0.5
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.84	2.85	9.7	9.9	9.6	9.6
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.22	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.85	8.6	8.8	8.6	8.6
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.35	3.69	3.83	5.3	5.3	4.5	4.7
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.1	0.7	3.86	3.78	4.71	4.93	3.9	4.0	3.3	3.5
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.17	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 5

**Rice Area, Yield, and Production  
World and Selected Countries and Regions**

	AREA		YIELD		PRODUCTION (Rough Basis)				PRODUCTION (Milled Basis)			
					Prel.	1991/92 Proj.	Prel.	1991/92 Proj.	Prel.	1990/91 June	July	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	1989/90	1990/91	June	July
	<b>Metric Hectares</b>				<b>Metric Tons Per Hectare</b>				<b>Million Metric Tons</b>			
World	146.6	147.1		3.5	3.5		508.1	513.9	512.2	508.5	87.7	87.7
United States	1.1	1.1		6.4	6.2		7.0	7.0	7.0	7.0	73.0	71.6
Total Foreign	145.5	145.9	146.3	3.4	3.5	3.5	501.1	506.8	505.2	501.5	87.6	87.5
Maj. Foreign Exporters	16.8	16.5	16.8	2.3	2.2	2.3	38.5	35.7	38.2	84.0	63.8	64.0
Burma	4.7	4.8	4.7	2.9	2.9	2.9	13.5	13.7	13.4	80.0	80.0	80.0
Pakistan	2.1	2.0	2.1	2.3	2.3	2.3	4.8	4.7	4.8	66.7	66.7	66.7
Thailand	10.0	9.7	10.0	2.0	1.8	2.0	20.2	17.3	20.0	66.0	66.0	66.0
Major Importers	13.9	13.7	13.7	4.2	4.2	4.2	58.6	58.1	58.0	66.1	38.7	38.4
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	2.1	2.4	2.3	67.0	67.4	67.4
Indonesia	10.5	10.3	10.4	4.2	4.4	4.3	44.7	45.0	44.6	65.0	65.0	65.0
Nigeria	0.6	0.7	0.7	1.4	1.4	1.4	0.9	0.9	0.9	80.0	80.0	80.0
Republic of Korea	1.3	1.2	1.2	6.4	6.2	6.4	8.1	7.7	7.9	72.6	5.9	5.6
Other Maj. Import. 1/	1.2	1.1	1.0	2.4	1.9	2.3	2.8	2.2	2.3	85.5	85.4	1.8
Other Foreign	114.8	115.7	115.9	3.5	3.6	3.5	403.9	413.0	405.4	405.4	88.2	88.2
Australia	0.1	0.1	0.1	8.0	8.8	7.9	0.9	0.8	0.9	71.5	71.5	71.5
Bangladesh	10.5	10.6	10.6	2.6	2.5	2.5	26.8	26.7	27.0	66.7	66.7	66.7
Brazil	4.3	4.5	5.3	1.7	2.1	1.9	7.2	9.3	10.0	68.0	68.0	68.0
China	32.7	33.1	32.6	5.5	5.6	5.5	180.1	185.0	180.0	70.0	70.0	70.0
India	42.2	42.2	42.0	2.6	2.7	2.6	111.1	112.5	109.5	66.7	66.7	66.7
Japan	2.1	2.1	2.1	6.2	6.3	6.2	12.8	13.1	12.9	72.8	72.8	72.8
Philippines	3.4	3.5	3.6	2.6	2.7	2.6	8.9	9.4	9.5	65.0	65.0	65.0
USSR	0.7	0.6	0.7	3.9	4.0	4.0	2.6	2.4	2.6	65.0	65.0	65.0
Vietnam	5.9	5.9	5.8	3.1	3.1	3.0	18.4	18.0	17.5	65.0	65.0	65.0
Others	12.9	13.2	13.1	2.7	2.7	2.7	35.0	35.8	35.4	86.1	86.1	86.1

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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**TABLE 6**  
**Oilseeds Area, Yield, and Production**  
**World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.		Prel.	1991/92 Proj.		Prel.	1991/92 Proj.			
	1989/90	1990/91	1991/92	1989/90	1990/91	June	July	1989/90	1990/91	June	July
	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
<b><u>SOYBEANS</u></b>											
World	58.26	54.06		1.84	1.92			107.27	103.62		107.01
United States	24.09	22.87		2.17	2.29			52.35	52.30		53.62
Total Foreign	34.16	31.20	32.20	1.61	1.65		1.66	54.92	51.32		53.40
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.84		1.88	31.09	26.50		28.25
Argentina	4.95	4.75	5.00	2.17	2.32		2.15	10.75	11.00		10.75
Brazil	11.40	9.65	10.00	1.78	1.61		1.75	20.34	15.50		17.50
Other Foreign	17.81	16.80	17.20	1.34	1.48		1.46	23.83	24.82		25.15
Canada	0.54	0.49	0.58	2.26	2.71		2.33	1.22	1.33		1.35
China	8.06	7.60	7.95	1.27	1.50		1.45	10.23	11.40		11.50
Eastern Europe	0.70	0.36	0.28	0.97	1.07		1.30	0.68	0.39		0.36
EC-12	0.63	0.69	0.58	3.13	3.12		3.14	1.98	2.17		1.81
India	2.13	2.30	2.40	0.80	1.04		1.00	1.72	2.40		2.40
Indonesia	1.21	1.24	1.26	1.09	1.09		1.11	1.32	1.35		1.40
Paraguay	0.98	0.89	0.90	1.61	1.46		1.78	1.58	1.30		1.60
USSR	0.83	0.84	0.84	1.15	1.05		1.14	0.96	0.88		0.96
Others	2.74	2.39	2.42	1.52	1.51		1.56	4.17	3.61		3.77
<b><u>COTTONSEED</u></b>											
World	32.06	33.44		0.96	1.00			30.89	33.48		35.07
United States	3.86	4.75		1.10	1.14			4.24	5.41		5.76
Total Foreign	28.20	28.69	29.69	0.94	0.98		0.99	26.65	28.07		29.31
China	5.20	5.53	6.10	1.24	1.39		1.39	6.44	7.66		8.50
India	7.33	7.60	7.80	0.60	0.53		0.54	4.40	4.00		4.20
Pakistan	2.60	2.69	2.78	1.12	1.21		1.23	2.91	3.26		3.40
USSR	3.33	3.15	3.15	1.53	1.56		1.56	5.11	4.92		4.93
Others	9.74	9.71	9.86	0.80	0.85		0.84	7.79	8.22		8.29
<b><u>PEANUTS</u></b>											
World	19.82	19.52		1.11	1.13			22.06	22.12		22.52
United States	0.67	0.73		2.72	2.23			1.81	1.63		2.14
Total Foreign	19.16	18.79	19.12	1.06	1.09		1.07	20.25	20.48		20.38
Argentina	0.18	0.20	0.19	1.87	2.37		2.11	0.34	0.48		0.40
China	2.96	2.96	3.02	1.81	2.15		1.92	5.37	6.37		5.80
India	8.71	8.10	8.30	0.93	0.90		0.92	8.09	7.30		7.60
Senegal	0.78	0.92	0.90	1.04	0.73		0.77	0.82	0.67		0.70
South Africa	0.09	0.09	0.09	1.28	1.59		1.50	0.11	0.14		0.14
Sudan	0.55	0.54	0.53	0.73	0.60		0.75	0.40	0.33		0.40
Others	5.89	5.99	6.09	0.87	0.87		0.88	5.13	5.21		5.35

**TABLE 6**  
**Oilseeds Area, Yield, and Production**  
**World and Selected Countries and Regions -- Continued**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	1991/92	Prel. 1989/90	1990/91	1991/92 Proj. June July	Prel. 1989/90	1990/91	1991/92 Proj. June July		
<b><u>SUNFLOWERSEED</u></b>	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
World	15.88	15.92		1.38	1.38		21.87	22.02		21.60	
United States	0.72	0.75		1.10	1.38		0.80	1.03		1.52	
Total Foreign	15.16	15.17	14.84	1.39	1.38	1.35	21.07	20.98		20.09	
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	3.80	3.90		3.50	
China	0.72	0.70	0.71	1.49	1.71	1.62	1.06	1.20		1.15	
EC-12	2.12	2.55	2.25	1.67	1.61	1.66	3.54	4.09		3.75	
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	2.29	2.09		2.08	
USSR	4.46	4.67	4.70	1.59	1.41	1.45	7.07	6.56		6.80	
Others	3.80	3.73	3.50	0.87	0.84	0.80	3.32	3.15		2.81	
<b><u>RAPESEED</u></b>											
World 1/	17.12	18.12		1.28	1.42		21.85	25.78		27.09	
Total Foreign	17.09	18.08	19.42	1.28	1.42	1.39	21.80	25.73		26.99	
Canada	2.90	2.58	3.20	1.07	1.29	1.31	3.10	3.33		4.20	
China	4.99	5.49	5.80	1.09	1.27	1.22	5.44	6.96		7.10	
EC-12	1.81	2.13	2.38	2.96	2.91	2.97	5.34	6.21		7.07	
East Europe	0.81	0.74	0.68	2.66	2.38	2.48	2.15	1.75		1.69	
India	4.99	5.60	5.70	0.83	1.02	0.88	4.12	5.70		5.00	
Others	1.59	1.54	1.66	1.04	1.16	1.16	1.65	1.78		1.93	
<b><u>FLAXSEED</u></b>											
World	3.74	3.79		0.50	0.62		1.85	2.34		2.10	
United States	0.07	0.10		0.47	0.95		0.03	0.10		0.11	
Total Foreign	3.67	3.69	3.50	0.50	0.61	0.57	1.82	2.24		1.98	
Argentina	0.58	0.58	0.55	0.90	0.83	0.84	0.52	0.48		0.46	
Canada	0.60	0.73	0.54	0.83	1.29	1.16	0.50	0.94		0.63	
India	1.18	1.20	1.20	0.29	0.33	0.33	0.34	0.40		0.40	
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.23	0.16		0.18	
Others	0.36	0.34	0.36	0.67	0.77	0.89	0.24	0.26		0.32	
<b><u>MAJOR OILSEEDS</u></b>	<b>146.88</b>	<b>144.84</b>		<b>1.40</b>	<b>1.45</b>		<b>205.80</b>	<b>209.35</b>		<b>215.39</b>	
United States	29.44	29.23		2.01	2.07		59.29	60.53	60.50	63.24	
Total Foreign	117.44	115.61	118.76	1.25	1.29	1.28	146.51	148.82		152.15	
<b>COPRA</b>	--	--	--	--	--	--	4.88	4.98		4.81	
<b>PALM KERNEL</b>	--	--	--	--	--	--	3.33	3.36		3.59	
<b>TOTAL OILSEEDS</b>	--	--	--	--	--	--	<b>214.01</b>	<b>217.68</b>	<b>223.00</b>	<b>223.79</b>	
<b>PALM OIL 2/</b>	--	--	--	--	--	--	10.91	11.04		11.86	

1/ Includes U.S. estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

TABLE 7

**Cotton Area, Yield, and Production  
World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	June	July	Prel. 1989/90	1990/91	June	July
	<b>---Million Hectares---</b>			<b>---Kilograms Per Hectare---</b>				<b>---Million 480-Pound Bales---</b>			
World	31.6	33.3		552	566			80.0	86.6	90.7	90.3
United States	3.9	4.7		688	711			12.2	15.5	16.0	16.2
Total Foreign	27.7	28.5	29.4	533	542	556	548	67.8	71.1	74.7	74.1
Maj. Foreign Exporters	13.1	13.3	13.7	727	783		778	43.7	47.7		49.1
Australia	0.2	0.3	0.3	1,326	1,411		1,322	1.4	1.8		1.7
Central America 1/	0.1	0.1	0.1	832	802		793	0.3	0.3		0.3
China	5.2	5.6	6.1	728	805		803	17.4	20.7		22.5
Egypt	0.4	0.4	0.4	683	719		755	1.3	1.4		1.3
Mexico	0.2	0.2	0.3	891	913		837	0.8	0.8		1.0
Pakistan	2.6	2.7	2.8	560	607		612	6.7	7.5		7.8
Sudan	0.3	0.2	0.2	456	499		498	0.6	0.4		0.4
Turkey	0.7	0.7	0.6	851	930		887	2.8	2.9		2.5
USSR	3.3	3.2	3.1	805	827		821	12.3	12.0		11.5
Major Importers 2/	0.4	0.4	0.3	886	794		911	1.5	1.5		1.4
Other Foreign	14.2	14.9	15.4	346	321		335	22.6	21.9		23.6
Argentina	0.6	0.6	0.6	486	444		465	1.3	1.3		1.3
Brazil	1.9	2.0	2.0	347	340		381	3.0	3.1		3.5
India	7.3	7.6	7.8	315	264		279	10.6	9.2		10.0
Syria	0.2	0.2	0.2	930	963		934	0.7	0.7		0.7
Others	4.3	4.5	4.8	358	370		370	7.0	7.7		8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

TABLE 8

The table below presents a 10-year record of the difference between the July projections and the final estimates. Using world wheat production as an example, changes between the July projection and the final estimate have averaged 15.7 million tons (3.1 percent) and ranged from -34.6 to 15.4 million tons. The July projection has been below the final 6 times and above the final 4 times.

## RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
<b>WHEAT</b>						
World	3.1	15.7	-34.6	15.4	6	4
U.S.	2.0	1.3	-2.6	2.2	4	6
Foreign	3.5	15.5	-32.0	16.1	6	4
<b>COARSE GRAINS 3/</b>						
World	2.3	17.9	-22.2	53.6	6	4
U.S.	8.2	15.4	-29.4	57.7	5	5
Foreign	1.8	10.3	-16.0	24.2	4	6
<b>RICE (Milled)</b>						
World	2.9	9.0	-24.0	13.0	7	3
U.S.	4.6	0.2	-0.5	0.3	5	3
Foreign	2.9	9.0	-24.3	12.7	7	3
<b>SOYBEANS</b>						
World	3.6	3.4	-3.6	7.5	3	7
U.S.	5.8	2.9	-5.4	9.7	5	5
Foreign	5.9	2.5	-3.0	5.0	4	6
	---Million 480-lb. Bales---					
<b>COTTON</b>						
World	3.8	3.0	-13.3	5.7	7	3
U.S.	9.2	1.2	-2.8	1.0	8	2
Foreign	3.3	2.3	-12.1	4.7	4	5
<b>UNITED STATES</b>	-----Million Bushels-----					
<b>CORN</b>	17.9	1,101	-3,327	2,379	5	5
<b>SORGHUM</b>	16.6	122	-228	171	6	4
<b>BARLEY</b>	13.2	52	-73	206	5	5
<b>OATS</b>	21.2	68	-77	231	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JULY 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

## CANADA

Adequate to abundant rain falls across the Prairies, soaking grains and oilseeds. Recent drier and warmer weather in Alberta promotes growth.



## EUROPE

Recent warmer weather promotes summer crop development. Hot, dry weather persists in Spain, while excessive rain inundates the Balkan countries. Winter wheat harvesting advances northward.



## NEW LANDS

Drought deteriorates crop conditions in most spring grain areas.



Heavy rain along the Yangtze causes widespread flooding. Favorable harvest conditions exist for winter wheat, except in Hebei. Beneficial rains fall along the southern coast and Taiwan easing long-term dry conditions, but portions of Jiangxi and Hunan remain dry.

## SOUTHEAST ASIA

Heat wave from June 20-July 5 and unfavorable dryness stress crops in the east. Ample moisture favors crops in the west.



## WESTERN USSR

Heat wave from June 20-July 5 and unfavorable dryness stress crops in the east. Ample moisture favors crops in the west.



Warm temperatures accelerate crop development east of the Rocky Mountains. Wet soils delay completion of planting in the western Corn Belt and Delta. Cool weather slows crop growth in Pacific Northwest.



## SOUTH AMERICA

In Argentina, periodic rains delay soybean harvesting and winter wheat planting. Favorable growing conditions exist in southern Brazil for winter grain.



## EASTERN ASIA

Drought deteriorates crop conditions in most spring grain areas.



Heavy rain along the Yangtze causes widespread flooding. Favorable harvest conditions exist for winter wheat, except in Hebei. Beneficial rains fall along the southern coast and Taiwan easing long-term dry conditions, but portions of Jiangxi and Hunan remain dry.

## SOUTHEAST ASIA

Heat wave from June 20-July 5 and unfavorable dryness stress crops in the east. Ample moisture favors crops in the west.



Unfavorable warm, dry weather in Thailand stresses corn and rice. Rainfall increases in the Philippines but dryness persists in Luzon's primary grain areas.



Adequate rainfall promotes winter grain establishment in most areas. Recent showers ease dryness in southern Queensland and northern New South Wales.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

## WEATHER BRIEFS

### SOVIET NEW LANDS: DRYNESS CONTINUED

Precipitation during June, 1991 continued to be below normal across a major portion of the spring wheat production area of the Soviet New Lands. The greatest impact has been in Kazakhstan's central growing region, where precipitation from April 7 - July 10, 1991 has been less than 25 percent of normal. Precipitation for this same period has been less than 50 percent of normal across the western portion of West Siberia, the southern Urals, and northern Kazakhstan, and near normal-to-normal in eastern West Siberia. The trend for above normal temperatures in the western New Lands and below normal temperatures in the east, continued during much of the period of June 12 - July 10, 1991. The hot temperatures (2 to 4 degrees above normal) and low surface soil moisture in the west and central New Lands caused continued unfavorable conditions for spring grains advancing through reproduction. Historically the New Lands produce about 65 percent of the Soviet Union's spring wheat. Hot and dry conditions in the Volga Valley of European U.S.S.R. during late June and early July, when grains were in the filling stage, have raised concern as well.

### INDIA: SOUTHWEST MONSOON STALLS

Though the southwest monsoon began on schedule across southern India in late May and early June, 1991, its progress northward has stalled during late June and early July, leaving large areas of northern India unseasonably hot and dry. Cumulative rainfall has been negligible since June 1, 1991 from Gujarat northeastward to Uttar Pradesh. For the second year in a row the monsoon is late in starting in Gujarat, delaying planting of groundnuts and rainfed cotton. Most of the rice in northwest India is irrigated and reservoirs are full. However, rice transplanting was underway by early July, and unseasonably hot temperatures stressed the transplants. Soybean planting in Madhya Pradesh has also been delayed, as the monsoon had just reached the soybean region when it stalled.

### THAILAND: BELOW NORMAL RAINFALL

Seasonal precipitation, as of July 10, 1991, remains below normal across much of Thailand's primary grain regions. Precipitation across the major rice and corn regions was highly variable during June, 1991, with some areas receiving only 25 percent of normal, while other areas received up to 75 percent. Seasonably warm temperatures accompanied the dryness stressing vegetative and reproductive crops.

### PHILIPPINES: DROUGHT CONTINUES IN NORTHERN LUZON

Precipitation was near normal-to-normal during June and early July, 1991 for southern Luzon and the central islands. However, precipitation was only 25-50 percent of normal in northern Luzon. Precipitation in the Cagayan Valley was 25 percent of normal in June. Precipitation has remained below normal during early July over northern Luzon and combined with warm temperatures to stress rice and corn crops.

## PRODUCTION BRIEFS

### AUSTRALIA: SUGAR CROP REVISED DOWNWARD

Australia's 1991/92 sugar production is estimated at 3.2 million tons, down 13 percent from the May forecast, according to the U.S. agricultural counselor in Canberra. The 1991/92 crop suffered from a December 1990 cyclone which reduced yields in some growing areas although the associated rain provided much needed moisture for crop development. The following 4 months were abnormally dry with reports of the driest March and April since the late 1870's in some important Queensland sugarcane growing areas. Sugarcane growers' incomes are expected to be reduced significantly.

### ETHIOPIA: COFFEE PRODUCTION ESTIMATE REVISED UPWARD

Estimated Ethiopian coffee production has been revised upward to 3.5 million 60-kilogram bags for 1990/91 from the previous estimate of 3.0 million in June, 1991 (see WAP 6-91), according to the U.S. embassy in Addis Ababa. The forecast for 1991/92 has also been revised upward from 3.0 million bags to 3.5 million. Three fairly distinct farming systems are discernible in coffee production: peasant cultivation (accounting for 86 percent), state farms (6 percent), and forest or wild coffee (8 percent). Fourteen varieties of arabica are grown.

Coffee's contribution to Ethiopia's gross domestic product, its share of total agricultural production, and the amount of revenue it generates for the central treasury are important to the economic survival of the country. The level of employment it provides and its status as the country's largest income earner are critical to the Ethiopian economy.

### PHILIPPINES: MT. PINATUBO ERUPTIONS IMPACT RICE CROP

According to the U.S. agricultural counselor in Manila, the major eruptions of Mt. Pinatubo on June 12-16 caused limited damage to standing rice, but there may be a reduction in agricultural output in west-central Luzon during the July-December wet season. Moreover, continuing minor eruptions and the onset of the typhoon season threaten to cause damaging mud-flows and flooding. Deposits of volcanic ash cover large portions of the surrounding rice areas. Virtually no standing rice was lost since the dry-season crop had been largely harvested just prior to the volcanic activity. However, in the immediate surrounding area, up to a foot of ash cover may make the land unplantable for the main wet-season (July-December) crop. Preliminary indications are that up to 20,000 hectares are unplantable in the near term, while an undetermined additional area may experience planting delays. The total 1991/92 area for harvest is estimated at 3.6 million hectares.

#### CHINA: TOBACCO PRODUCTION DOWN IN 1991

The U.S. agricultural counselor in Beijing reports that 1991 tobacco production is estimated at 2.622 million tons (farm-sales-weight basis), down from the revised 1990 level of 2.624 million tons. Flue-cured tobacco is estimated at 2.250 million tons, down from 2.260 million in 1990 and 2.405 million in 1989. The decline in production since 1989 is due to higher returns for cotton and oilseeds and more stringent grading standards for tobacco. Tobacco production might have declined even more in the past 2 years but local governments have encouraged farmers to maintain production because it generates tax income. Since 1989 production of dark-air and sun-cured tobacco has fallen from 270,800 tons to 200,000 tons for both 1990 and 1991. Estimated production for other types for 1991 (burley, 80,000 tons; oriental, 7,700 tons; and cigar 79,900 tons) has been increasing due to enlarged export prospects in the case of cigar tobacco and higher demand for blending in local cigarette production for the other types.

#### UGANDA: COFFEE PRODUCTION ESTIMATE REVISED DOWNWARD

Ugandan 1990/91 coffee production is estimated at 2.7 million 60-kilogram bags, 10 percent less than the 3.0-million-bag June estimate, according to the U.S. Embassy in Kampala. The 1991/92 forecast remains unchanged at 3.0 million bags. However, the 1989/90 outturn was revised downward by 19 percent from 3.1 million to 2.5 million bags, and the 1988/89 estimate was revised upward, by 10 percent to 3.3 million bags from 3.0 million. The small 1989/90 crop resulted from low returns to farmers, limiting their ability to purchase fertilizers or fungicides. When inputs became available, farmers used them on crops with higher returns than coffee. Many farmers stopped pruning their coffee trees and some uprooted them to plant more profitable crops such as bananas.

Uganda's (mainly robusta) coffee is produced by smallholders throughout the central part of the country from the slopes of Mount Elgon in the east to the West Nile in the northwest to Kigezi in the southwest. Area under coffee is estimated at 400,000 hectares and has not changed much in the past decade. It is reported that coffee trees generally range in age from 30 to 50 years.

#### JAPAN: LOWER GOVERNMENT PURCHASE PRICE FOR 1991 RICE CROP

The new Japanese Government producer price for the 1991 rice crop will be about 1 percent lower than last year. Since 1987 the producer price has been reduced four times for a total of 12.2 percent. The Ministry of Agriculture, Forestry, and Fisheries and the Ministry of Finance had originally planned to reduce prices by 2 to 3 percent in an attempt to narrow the gap between domestic and overseas market prices, but they agreed to the smaller cut in the face of farmer opposition. Members of the legislature who represent farmers argued that the price should have been left unchanged since rice growers face severe hardships as a result of past price reductions, increased production costs, labor shortages, and hikes in interest payments.

## TAIWAN: DROUGHT IMPACT ON TAIWAN'S AGRICULTURE

The Taiwan Council of Agriculture (COA) has released statistics detailing the impact of this year's spring drought on agricultural production in Taiwan. Agricultural losses totaled 3,680 million New Taiwan Dollars (NTD) (U.S.\$135 million) as of June 20, compared to total agricultural output value of NTD 313,544 (\$11,570 million) in 1990. Less than 1 percent of the first rice crop, Taiwan's leading farm income source was damaged, but about 9 percent of Taiwan's corn was damaged during the drought. The peanut crop also was affected by the drought, but fruit and vegetable production was not badly hurt, and the resumption of rain in the second half of June allowed farmers to plant the second rice crop. The COA also reported production losses in aquaculture and forestry, but the livestock sector was unharmed. The authorities have developed a package of relief measures for the nine counties most affected by the drought. The package includes low interest loans, flexible terms, and direct cash payments to rice, corn, peanut, and fish producers.

## PARAGUAY: ECONOMIC INTEGRATION MAY IMPACT THE AGRICULTURE SECTOR

The Treaty of Asuncion was signed on March 26, 1991 creating the Mercosur (Mercado Comun Del Sur, or Southern Common Market), which establishes a framework for economic integration between Brazil, Argentina, Uruguay, and Paraguay. The common market is intended to allow the free movement of goods, services, and people between the four countries by the end of 1995. Each country and the various sectors within each country will be impacted by the integration differently. Paraguay and Uruguay will receive preferential treatment during the transition period (1991-1995), due to the small size of their economies. As exporting products to neighboring countries becomes easier, incentives to boost production within the agricultural sector should increase.

Paraguayan exports may increase if the Mercosur eliminates conditions that currently inflate costs and restrict trade. For example, exports of beef to Brazil have faced stiff competition from the European Community, which provides beef at subsidized prices. Paraguay hopes to obtain improved access to the Brazilian beef market by establishing duties against such subsidized imports. Fresh tomato exports to Argentina were blocked in 1986, when the Argentine government imposed an import quota on Paraguayan tomatoes. If these quotas are abolished, Paraguayan growers (who have the advantage of a longer growing season) could increase exports of tomatoes and other fruits and vegetables. Soybean and cotton exports to Brazil also may increase. Conversely, Paraguay may be forced to end its periodic bans on the importation of Argentine wheat, which is of better quality and lower in price than domestic wheat. This could lead to a reduction in Paraguayan wheat production. However, the Paraguayan Ministry of Agriculture believes that the wheat sector will maintain production because wheat is double-cropped with soybeans and provides off-season income for soybean producers.

#### CHINA: SEVERE FLOODING CAUSES CROP LOSSES

Unusually heavy rain from mid-May through early July has caused severe flooding and some crop losses in central China this year. Reports in the Chinese press state that by the end of June, the worst flooding in 70 years had affected more than 8.7 million hectares of farmland, killed more than 800 people and caused billions of dollars in damage. Hardest hit were the southern section of Henan and the north-central provinces of Anhui and Jiangsu, although significant flooding also was reported in Zhejiang, western Sichuan, and northern Hebei provinces. These provinces had anticipated record or near-record wheat crops prior to the start of the rains, which struck during the harvest season. Chinese authorities now estimate that several million tons of wheat may have been lost from the flood-affected areas, as well as an undetermined amount of rapeseed. The persistent rain also lowered wheat quality in many areas. However, these crop losses have been partially offset by record wheat harvests in Sichuan, Shandong, and Shaanxi provinces. The flooding also may have hurt rice, cotton, and other summer-sown crops in central China, but the amount of damage is unknown at this time.

#### ARGENTINA: GRAPE CROP DOWN DUE TO WEATHER

The recently harvested 1991 grape crop is estimated to have fallen 30 to 35 percent below the 1990 crop of 2.6 million tons according to a report from the U.S. agricultural counselor in Buenos Aires. Irrigation water shortages, due to insufficient snowfall in the mountains, plus hail storms in several areas caused the downturn. The southern region of Mendoza province was most affected. Grape production in Mendoza mainly is destined for wine and concentrated grape juice production while grapes from neighboring San Juan province are used for table grapes, raisins, and white wine.

#### YUGOSLAVIA: DRIED PRUNE OUTPUT REDUCED

In Yugoslavia the final estimate of dried prune production in 1990 is 5,239 tons, down over 50 percent from the 1989 level of 12,148 tons, according to the U.S. agricultural attache in Belgrade. The decline largely is due to reduced export demand by the USSR, its biggest market. Prospects for 1991 production generally are unfavorable as a cold, wet spring cut prospects for fresh plum production and export markets for dried prunes are viewed as being unfavorable.

EUROPEAN COMMUNITY GRAIN PRODUCTION SITUATION

Total grain production (excluding rice) in the European Community (EC) for 1991/92 is projected at 178.3 million tons from an area of 36.3 million hectares. This is an increase of 6 percent from an estimated crop of 168.7 million tons produced during 1990/91 and up slightly from last month's forecast. Growing conditions this year generally have been favorable throughout northern Europe with predominately cool, wet weather. The Iberian peninsula has experienced abnormally dry conditions which have affected grain crops severely.

Wheat: Production in the EC for 1991/92 is projected at a record 88.8 million tons, 5 percent above last year's 84.8 million tons. Harvested area is expected to be up 3 percent from last year to a record 17.0 million hectares. Weather has been nearly ideal for wheat across northern Europe this season. Conditions generally were favorable with adequate moisture and mild temperatures. France is by far the largest producer of wheat in the EC followed by the United Kingdom and Germany. Both France and the United Kingdom are expected to produce record wheat crops again this year. The Iberian peninsula on the other hand has suffered from severe drought since March as well as occasional freezing temperatures during April. More recently the crops there have been stressed by hot weather.

The EC's recent wheat production records have been caused by large increases in area harvested, switching from spring to winter varieties, favorable weather, strong prices, and the introduction of new high yielding varieties. This upward trend in wheat production will likely continue.

Barley: Production for 1991/92 is projected at 50.3 million tons, down 1 percent from last year's 50.8 million tons due to lower sown area. EC barley area has been declining steadily from a high of 14.5 million hectares in 1979 to 12.1 million this year, a reduction of 17 percent. In general, spring barley sowings have fallen because of low yields and prices relative to winter barley and wheat. Wheat and oilseeds have replaced much of the shifted spring barley area. Germany and France are the two major barley producers in the EC with Germany producing a projected 14.5 million tons and France producing 10.1 million. The favorable growing conditions experienced by wheat in northern Europe also improved prospects for barley production. Spanish barley production has suffered due to this year's unfavorable weather in the Iberian peninsula and is projected to total only 9.0 million tons, the lowest level since 1986.

Oats: The projected 1991/92 production is 4.9 million tons from an area of 1.6 million hectares. This year's production is up 4 percent from last year. Area sown to oats in the EC has been declining since the large crops of the early 1970's. Set-aside programs have significantly reduced area sown to oats and mixed grains this year because yields have been lagging the overall average of other crops.

Corn: Production for 1991/92 is projected at 28.3 million tons, up 30 percent from last year's drought-reduced crop and only 1 percent below the record crop produced in 1988. Corn area is estimated at 4.0 million hectares, a return to the record level of 1988 due to favorable rainfall this winter and high prices relative to other grains. In general, corn area in the EC has remained relatively constant over the past 10 years, averaging 3.8 million hectares. In Spain, dry weather again this year has caused some problems for corn during the germination and emergence stages; however, since most corn is grown under irrigation the effects of the dryness likely will be moderated. The French crop is expected to produce record yields following last year's drought.

Rye: Production for 1991/92 is projected at 4.7 million tons, down 12 percent from last year. Area planted to rye is estimated at 1.2 million hectares, a decline from the high of 1.8 million in the early 1980's. Area tends to remain small since average yields are lower than those of other grains. Rye is traditionally sown in less fertile soils except in the case of contract sowing for processors. The cost of seed for the hybrid varieties that are generally grown under contract is about 150 percent more than that for common varieties.

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TABLE 9  
**EC-12 GRAIN AREA**  
(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Barley</b>										
Bel-Lux	149	154	152	135	147	140	137	125	107	103
Denmark	1,485	1,359	1,180	1,104	1,078	943	1,165	988	887	880
France	2,388	2,140	2,117	2,248	2,075	1,967	1,862	1,810	1,760	1,750
Germany	3,002	2,924	2,872	2,831	2,842	2,740	2,710	2,625	2,613	2,560
Greece	311	312	334	326	284	267	220	225	245	210
Ireland	334	304	294	298	283	276	266	263	237	230
Italy	352	383	434	468	465	445	450	471	467	420
Netherlands	44	37	34	39	42	50	63	50	40	35
Portugal	77	88	97	86	87	84	74	125	55	75
Spain	3,615	3,735	4,023	4,246	4,340	4,352	4,175	4,260	4,359	4,300
United Kingdom	2,222	2,143	1,978	1,965	1,917	1,831	1,913	1,662	1,529	1,515
<i>EC-12</i>	<i>13,979</i>	<i>13,579</i>	<i>13,515</i>	<i>13,746</i>	<i>13,560</i>	<i>13,095</i>	<i>13,035</i>	<i>12,604</i>	<i>12,299</i>	<i>12,078</i>
<b>Corn</b>										
Bel-Lux	7	5	8	7	8	6	7	7	8	8
France	1,646	1,654	1,730	1,857	1,869	1,737	1,995	1,910	1,600	1,900
Germany	161	170	186	183	193	201	209	219	257	290
Greece	163	171	205	207	201	245	228	180	162	195
Italy	1,011	986	961	923	849	768	843	804	768	850
Netherlands	1	1	1	0	0	0	0	1	1	1
Portugal	352	311	319	241	258	220	250	260	272	270
Spain	418	354	440	526	524	540	556	510	408	480
<i>EC-12</i>	<i>3,759</i>	<i>3,652</i>	<i>3,850</i>	<i>3,944</i>	<i>3,902</i>	<i>3,717</i>	<i>4,088</i>	<i>3,891</i>	<i>3,476</i>	<i>3,994</i>
<b>Mixed Grain</b>										
Denmark	4	3	3	3	3	3	3	3	3	3
France	143	133	155	171	198	214	113	130	140	150
Germany	73	18	27	22	20	18	18	18	21	18
Spain	8	5	5	5	5	8	9	9	47	57
United Kingdom	10	8	8	7	7	6	5	5	5	4
<i>EC-12</i>	<i>238</i>	<i>167</i>	<i>198</i>	<i>208</i>	<i>233</i>	<i>249</i>	<i>148</i>	<i>165</i>	<i>216</i>	<i>232</i>

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 9 (Continued)

# EC-12 GRAIN AREA

(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Oats</b>										
Bel-Lux	52	28	27	29	21	21	22	20	14	14
Denmark	43	29	31	37	27	18	43	27	20	25
France	518	434	433	425	308	267	261	260	220	210
Germany	1,106	892	830	875	768	708	724	658	473	540
Greece	52	48	44	42	42	40	40	40	40	40
Ireland	23	22	24	23	21	20	20	19	19	19
Italy	219	209	191	182	184	176	171	169	158	150
Netherlands	24	14	12	11	7	9	13	8	3	5
Portugal	170	191	185	190	194	197	167	188	108	160
Spain	442	454	479	459	394	353	335	345	350	370
United Kingdom	129	108	106	133	95	99	120	119	106	106
<i>EC-12</i>	2,778	2,429	2,362	2,406	2,061	1,908	1,916	1,853	1,511	1,639
<b>Rice, Milled</b>										
France	5	7	9	11	12	12	14	17	19	20
Greece	16	14	16	16	18	18	21	16	16	17
Italy	178	184	180	187	193	191	199	206	214	210
Portugal	34	27	30	30	32	32	33	33	33	33
Spain	68	41	73	74	79	76	80	59	90	95
<i>EC-12</i>	301	273	308	318	334	329	347	331	372	375
<b>Rye</b>										
Bel-Lux	8	7	9	8	10	13	11	11	13	13
Denmark	55	77	122	127	120	136	81	101	110	95
France	110	97	96	84	74	75	75	75	65	65
Germany	1,075	1,169	1,168	1,127	1,105	1,078	997	1,013	1,056	700
Greece	3	4	7	9	11	13	15	15	15	15
Italy	13	11	9	9	8	8	8	.8	8	8
Netherlands	6	7	6	5	4	6	7	7	9	8
Portugal	194	133	131	122	124	128	121	122	98	110
Spain	212	217	231	211	221	222	222	227	206	200
United Kingdom	6	7	6	8	6	7	7	7	7	7
<i>EC-12</i>	1,682	1,729	1,785	1,710	1,683	1,686	1,544	1,586	1,587	1,221

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 9 (Continued)

# EC-12 GRAIN AREA

(1,000 Hectares)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Sorghum</b>										
France	56	54	59	44	46	37	42	70	70	50
Italy	20	25	22	15	13	14	19	22	24	25
Spain	27	20	21	21	19	14	17	16	16	15
<b>EC-12</b>	<b>103</b>	<b>99</b>	<b>102</b>	<b>80</b>	<b>78</b>	<b>65</b>	<b>78</b>	<b>108</b>	<b>110</b>	<b>90</b>
<b>Wheat</b>										
Bel-Lux	183	203	194	194	198	199	204	220	224	229
Denmark	180	243	333	340	354	398	309	446	536	560
France	4,845	4,811	5,100	4,832	4,905	4,959	4,807	5,000	5,180	5,360
Germany	2,169	2,409	2,381	2,356	2,397	2,419	2,508	2,547	2,430	2,500
Greece	1,033	1,002	924	848	872	869	880	890	880	1,010
Ireland	57	59	78	78	76	57	60	62	73	80
Italy	3,326	3,328	3,274	3,034	3,136	3,087	2,876	2,943	2,773	2,700
Netherlands	131	148	143	128	118	111	114	138	141	140
Portugal	366	331	280	282	317	324	294	334	180	225
Spain	2,662	2,603	2,306	2,043	2,114	2,223	2,333	2,295	2,006	2,170
United Kingdom	1,663	1,695	1,939	1,902	1,997	1,994	1,886	2,106	2,050	2,020
<b>EC-12</b>	<b>16,615</b>	<b>16,832</b>	<b>16,952</b>	<b>16,037</b>	<b>16,484</b>	<b>16,640</b>	<b>16,271</b>	<b>16,981</b>	<b>16,473</b>	<b>16,994</b>

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10  
**EC-12 GRAIN PRODUCTION**  
(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Barley</b>										
Bel-Lux	814	705	934	746	879	738	802	706	592	600
Denmark	6,357	4,423	6,072	5,251	5,134	4,292	5,419	4,959	4,984	4,600
France	10,036	8,759	11,699	11,470	9,950	10,528	9,800	9,840	10,100	10,100
Germany	13,515	12,826	14,422	14,056	13,670	12,769	13,385	14,416	13,992	14,500
Greece	872	572	831	619	739	626	550	500	480	500
Ireland	1,530	1,403	1,666	1,410	1,338	1,487	1,370	1,475	1,292	1,220
Italy	1,060	1,174	1,618	1,630	1,543	1,708	1,561	1,644	1,702	1,600
Netherlands	247	177	192	197	262	262	302	251	219	185
Portugal	51	54	135	65	90	100	51	87	62	50
Spain	5,269	6,662	10,789	10,698	7,431	9,282	12,070	9,100	9,414	9,000
United Kingdom	10,960	9,980	11,055	9,740	10,015	9,225	8,705	8,070	8,000	7,900
<b>EC-12</b>	<b>50,711</b>	<b>46,735</b>	<b>59,413</b>	<b>55,882</b>	<b>51,051</b>	<b>51,017</b>	<b>54,015</b>	<b>51,048</b>	<b>50,837</b>	<b>50,255</b>
<b>Corn</b>										
Bel-Lux	52	39	53	51	53	40	54	54	50	50
France	10,400	10,400	10,384	12,367	11,470	12,454	14,578	13,400	9,500	14,000
Germany	1,057	935	1,038	1,218	1,327	1,252	1,591	1,633	1,624	1,850
Greece	1,449	1,550	1,990	1,822	1,921	2,300	1,850	1,650	1,400	1,900
Italy	6,847	6,669	6,672	6,357	6,401	5,762	6,318	6,359	5,864	6,700
Netherlands	1	1	1	0	0	0	0	6	4	5
Portugal	421	424	483	531	628	620	647	674	643	645
Spain	2,330	1,803	2,529	3,414	3,424	3,526	3,557	3,100	2,600	3,100
<b>EC-12</b>	<b>22,557</b>	<b>21,821</b>	<b>23,150</b>	<b>25,760</b>	<b>25,224</b>	<b>25,954</b>	<b>28,595</b>	<b>26,876</b>	<b>21,685</b>	<b>28,250</b>
<b>Mixed Grain</b>										
Denmark	16	7	7	8	8	8	7	7	8	7
France	459	409	624	671	692	931	449	560	590	640
Germany	246	42	98	67	70	50	50	50	90	50
Spain	9	4	8	7	7	10	11	10	97	120
United Kingdom	39	35	35	30	29	26	20	20	20	20
<b>EC-12</b>	<b>769</b>	<b>497</b>	<b>772</b>	<b>783</b>	<b>806</b>	<b>1,025</b>	<b>537</b>	<b>647</b>	<b>805</b>	<b>837</b>

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

# EC-12 GRAIN PRODUCTION

(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Oats</b>										
Bel-Lux	225	110	122	126	81	82	96	63	52	53
Denmark	178	86	150	152	111	94	202	125	121	120
France	1,802	1,374	1,892	1,803	1,007	1,045	984	970	850	800
Germany	4,625	2,989	3,673	4,024	3,353	3,043	2,941	2,422	2,105	2,400
Greece	82	54	72	62	79	62	73	62	62	70
Ireland	93	108	131	100	97	100	98	103	116	108
Italy	359	307	433	363	397	361	383	296	306	300
Netherlands	136	61	58	58	40	47	60	32	16	25
Portugal	86	99	195	119	153	155	81	130	62	110
Spain	443	464	788	680	433	502	537	494	524	460
United Kingdom	575	465	516	615	505	450	545	530	550	500
<i>EC-12</i>	<i>8,604</i>	<i>6,117</i>	<i>8,030</i>	<i>8,102</i>	<i>6,256</i>	<i>5,941</i>	<i>6,000</i>	<i>5,227</i>	<i>4,764</i>	<i>4,946</i>
<b>Rice, Milled</b>										
France	17	23	23	40	39	38	48	63	75	78
Greece	52	52	57	67	75	73	72	68	60	63
Italy	620	648	658	799	728	746	750	921	963	870
Portugal	93	71	87	96	97	94	95	96	99	96
Spain	281	157	306	321	346	338	349	238	398	420
<i>EC-12</i>	<i>1,063</i>	<i>951</i>	<i>1,131</i>	<i>1,323</i>	<i>1,285</i>	<i>1,289</i>	<i>1,314</i>	<i>1,386</i>	<i>1,595</i>	<i>1,527</i>
<b>Rye</b>										
Bel-Lux	33	28	42	33	55	56	56	56	63	64
Denmark	235	315	608	565	546	513	366	487	544	460
France	327	278	321	283	200	275	260	270	240	240
Germany	3,822	3,738	4,493	4,382	4,224	3,928	3,419	3,915	3,989	3,450
Greece	6	9	15	20	23	25	31	30	30	30
Italy	32	28	24	23	22	20	18	21	21	21
Netherlands	26	26	25	19	19	25	28	33	36	35
Portugal	119	93	115	97	100	108	77	98	77	85
Spain	169	253	315	273	220	320	357	336	274	250
United Kingdom	27	24	28	35	30	32	33	36	36	40
<i>EC-12</i>	<i>4,796</i>	<i>4,792</i>	<i>5,986</i>	<i>5,730</i>	<i>5,439</i>	<i>5,302</i>	<i>4,645</i>	<i>5,282</i>	<i>5,310</i>	<i>4,675</i>

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

# EC-12 GRAIN PRODUCTION

(1,000 Metric Tons)

	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<b>Sorghum</b>										
France	276	255	257	202	183	196	254	305	275	300
Italy	91	100	105	56	82	80	107	139	114	120
Spain	115	79	95	99	97	71	96	85	90	85
<b>EC-12</b>	<b>482</b>	<b>434</b>	<b>457</b>	<b>357</b>	<b>362</b>	<b>347</b>	<b>457</b>	<b>529</b>	<b>479</b>	<b>505</b>
<b>Wheat</b>										
Bel-Lux	1,063	1,062	1,330	1,204	1,342	1,114	1,321	1,478	1,409	1,470
Denmark	1,207	1,548	2,446	1,972	2,177	2,285	2,080	3,224	3,953	4,050
France	25,368	24,807	33,241	29,262	26,665	27,234	29,540	32,100	33,700	34,500
Germany	11,372	12,548	14,126	13,802	14,601	13,972	15,622	14,482	15,242	16,300
Greece	2,983	2,043	2,646	1,775	2,200	2,118	2,300	1,984	1,680	2,660
Ireland	380	377	585	467	399	373	417	474	601	600
Italy	8,903	8,514	10,057	8,461	9,102	9,381	7,952	7,413	8,108	8,400
Netherlands	967	1,043	1,131	851	940	769	827	1,047	1,076	1,050
Portugal	426	327	470	395	502	534	394	605	268	400
Spain	4,410	4,268	6,052	5,329	4,392	5,768	6,173	5,200	4,700	5,100
United Kingdom	10,320	10,802	14,957	12,045	13,910	11,940	11,750	14,030	14,100	14,300
<b>EC-12</b>	<b>67,399</b>	<b>67,339</b>	<b>87,041</b>	<b>75,563</b>	<b>76,230</b>	<b>75,488</b>	<b>78,376</b>	<b>82,037</b>	<b>84,837</b>	<b>88,830</b>

July 1991

Production Estimates and Crop Assessment Division, FAS, USDA

## WORLD COTTON PRODUCTION OUTLOOK FOR 1991/92

World cotton production for 1991/92 is projected to rise 4 percent to a record 90.3 million 480-pound bales. Foreign production is predicted at 74.1 million bales with foreign harvested cotton area at 29.4 million hectares, second only to the 1984/85 record of 76.0 million bales and 29.7 million hectares. The 1991/92 record world production forecast is supported by this planting season's higher cotton prices relative to last season, continued strong demand, and central government support for increased cotton output in many countries.

Production in China for 1991/92 is estimated at 22.5 million bales, up 1.8 million bales from the 1990/91 level. Last year, China produced an estimated 20.7 million bales, the highest since its record crop of nearly 29.0 million bales in 1984/85. The government is pressing for increased output to allow China to become a consistent exporter of raw cotton and a major exporter of textiles while meeting its rapidly rising domestic consumption requirements. High fixed government cotton procurement prices have attracted land away from corn which is depressed by lower prices following a record 1990/91 corn crop. Production policies for 1991/92 call for continuation of attractive prices and subsidization of inputs at 1990/91 levels. In addition, several major cotton producing provinces have indicated that they also will maintain supplemental subsidies at the same level as offered last year. Available input supplies for this year's crop are expected to remain largely unchanged from 1990/91.

Production in the United States for 1991/92 is projected at 16.2 million bales, up 5 percent from last year and the largest crop since 1953/54 when output reached 16.4 million bales. Due to late planting and/or replanting in some areas, cotton development is behind the normal seasonal pace and behind last year but conditions have improved. Planted area is 15 percent above last year.

Cotton production in the Soviet Union for 1991/92 is projected at 11.5 million bales, down 0.5 million bales from 1990/91. The area under cultivation continues to decrease as Central Asian republics attempt to diversify their crops. A lack of feed and produce production in Central Asia has prompted a reduction in cotton plantings to devote more area to food and forage crops. Ecological considerations including soil salinization, loss of soil fertility, and depletion of scarce water resources also have prompted a shift away from cotton.

In South Asia, cotton production is projected to push above 1990/91 with growth occurring mostly in Pakistan and India. For the 1991/92 season, Pakistani cotton production is expected to set a new record at 7.8 million 480-pound bales. Growth is being influenced by this year's higher cotton prices along with a continued strong domestic demand from the expanding textile industry. For 1991/92, seed and fertilizer supplies are good. Area expansion has been constrained by a lack of available land in the major cotton producing region. In India, output for 1991/92 is projected at 10.0 million bales, well above the 9.2 million bales produced last year but below the record 10.5 million-bale crop set in 1989/90. The domestic cotton situation is tight and prices have remained high. Both conditions bode well for higher output this year. In Australia, production for 1991/92 is expected to be almost as large as the 1990/91 crop if cotton prices remain strong as planting time nears in September-October and if sufficient soil moisture is available to maintain the 1990 level of dryland seeding.

In Mexico, cotton production for 1991/92 is anticipated to rebound to 1.0 million bales following two consecutive less-than-optimum crop years. The expected output increase is due to high reservoir levels and cropping alternatives that currently favor cotton. In Central America, production is projected to rise moderately to 0.3 million bales in 1991/92 because of attractive cotton prices. South American cotton output for 1991/92, with farming operations soon to begin could increase by about 10 percent over 1990/91. However, the forecast of higher output is based on expectations of a more timely release of government-supplied production financing than occurred at the outset of 1990/91. The 1991/92 Brazilian cotton crop currently is forecast at 3.5 million bales, 13 percent above 1990/91. Most of the projected growth is based on a recovery in yields as area is estimated only slightly larger than last year. In Argentina, the second largest producer in South America, production for 1991/92 is expected to decline slightly to 1.3 million bales, 2 percent below last year. Planted area is expected to be down due to farmers' tight financial situation.

In Turkey, cotton production for 1991/92 is projected at 2.5 million bales, down 11 percent from last season. The slippage in production is reflected in farmers' switch to other crops as the government excludes cotton from support programs. In addition, unsuitable planting weather in June has further placed cotton output at risk. In early June, cotton planting still was continuing as rain in all cotton producing districts had slowed sowings and necessitated some replanting. This situation likely will delay maturity and increase the risk of rain damage during harvest.

Egypt is expected to produce 1.3 million bales for 1991/92, down 6 percent from last year. The drop in output is the result of weak and unclear producer incentives including low procurement prices. Planted area for 1991/92 is estimated down from last year, mainly in response to a new government policy to remove marginal land from the cotton rotation.

For the African 'Franc Zone' countries, 1991/92 cotton production is forecast at 2.6 million bales, up 7 percent from last season. Many of the countries in this group depend heavily on cotton exports for foreign exchange earnings. Because of this need, there is strong governmental support for the cotton sector in the form of subsidized inputs. This is particularly true for Cote d'Ivoire, Mali, Benin, Cameroon, and Burkina. The largest percentage increase is projected to occur in Cote d'Ivoire, up 19 percent to 0.6 million bales. The increase is due to expanded area, favorable rains at planting, and continued improvement in yields.

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Ronald R. Roberson (202) 382-8879

TABLE 11

## 1991/92 Forecast of World Cotton Production

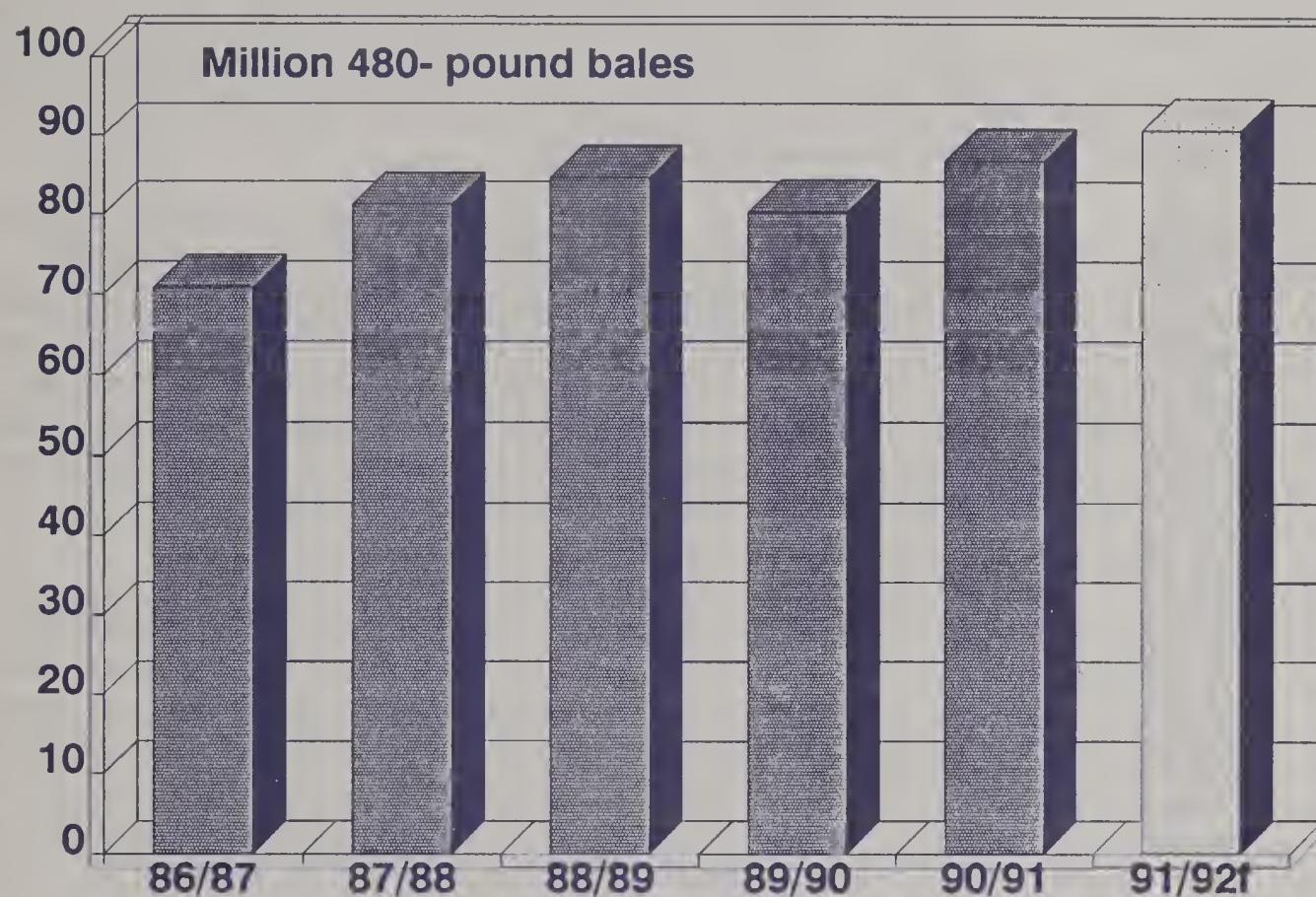


TABLE 12

WORLD COTTON AREA, YIELD, AND PRODUCTION			
Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 480-Bales)
1981/82	32,977	468	70,886
1982/83	31,393	472	68,035
1983/84	30,838	465	65,854
1984/85	33,859	571	88,757
1985/86	31,670	553	80,431
1986/87	29,492	521	70,567
1987/88	31,021	569	81,008
1988/89	33,701	547	84,661
1989/90	31,550	552	80,004
Prel. 1990/91	33,294	566	86,618
5-Year Avg.	31,487	549	79,334
Forecast 1991/92			90,326

## PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES

Output of tomatoes for processing in 11 major producing countries is estimated at 19.2 million tons for 1991, down 3 percent from the 1990 level. Preliminary data indicate the 1991 area harvested in the 11 countries also will be down about 3 percent compared to 1990. The decrease in area mainly is occurring in the EC. Production of processing tomatoes in the Mediterranean Basin (listed EC countries plus Turkey and Israel) is forecast to decline sharply in 1991 due to lower output in all countries except Greece.

In the United States, production under contract is forecast at 10.0 million tons, 6 percent above the total production in 1990. Area planted under contract is up slightly and improved yields are anticipated. Canadian output of processing tomatoes is expected to be down in 1991 as financial difficulties on the part of processors has reduced contracting. Mexico's elimination in July 1988 of the quota system on tomato plantings and stronger prices for tomato products induced a significant production increase in both 1989 and 1990. Area planted for the 1991 crop (harvested February-May 1991) is estimated to have expanded about 10 percent.

Output of processing tomatoes in the 5 EC countries listed is estimated at 6.7 million tons, 10 percent below 1990. The crop is forecast to be down due to unfavorable spring weather in several major growing areas and less favorable prospects for profitable over-quota production. EC support prices in ECU terms are unchanged from 1990, but due to currency realignments, producers in some countries are receiving support price increases. The overall EC quota is up 200,000 tons, with Spain and Portugal each getting half the increase.

Output in Italy, the leading EC producer, is forecast at 3.4 million tons, down sharply from 1990 largely due to unfavorable spring weather. Processing tomato production in Greece for 1991 is forecast up from last year's drought-reduced output. Area planted is estimated to be up slightly as prices for alternative crops are less favorable than those of tomatoes. Spain's production of processing tomatoes for 1991, estimated at 1.1 million tons, is 7 percent below the 1990 crop due to the stock build-up in the product sector. That build-up has hurt prospects for profitable over-quota production. Though production is forecast to decline, it is still adequate to fulfill Spain's EC quota. Output of processing tomatoes in Portugal, estimated at 702,000 tons, is forecast down 15 percent from last year's record. Processors are burdened with unsold stocks and are less likely to buy over-quota production. French output of processing tomatoes is forecast down in 1991 as producers are feeling the impact of more competitively priced imports.

Turkey's output of commercial processing tomatoes is estimated at 1.3 million tons in 1991, down 130,000 from the 1990 level and 380,000 off the 1989 record. Unfavorable price relationships are the reason that output continues to slide. Israel's 1991 output is forecast at 120,000 tons, less than one-third of the 1990 level. A severe shortage of irrigation water is causing the decline.

Taiwan's 1991 output of processing tomatoes (harvested December 1990 - April 1991) is forecast at 185,000 tons, up slightly from the 1990 figure. Final yield estimates are expected to be above last year's levels which were depressed by typhoon damage.

TABLE 13

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES  
(1,000 Tons)

Country	1989	1990	Forecast 1991
United States	8,604	9,394	9,966 1/
Canada	539	580	500
Mexico	317	365	400
Italy	3,800	4,000	3,400
France	324	326	320
Greece	1,400 2/	1,150 3/	1,250
Spain	976	1,134	1,055
Portugal	611	824	702
Turkey	1,700	1,450	1,320
Israel	329	370	120
Taiwan	220	182	185
<b>Total</b>	<b>18,820</b>	<b>19,775</b>	<b>19,218</b>

1/ Contract production only.

2/ Includes 8,000 tons withdrawn from the market and approximately 100,000 tons not delivered to processors.

3/ Includes approximately 80,000 tons diverted to the fresh market.

JULY 1991

Production Estimates and Crop Assessment Division

## Israeli Oilseed Production

Total 1991 oilseed production in Israel is estimated at 72,000 metric tons, down 43,000 tons or 37 percent from last year and down 145,000 from the record crop of 1984. Harvested area and production have been declining since the early 1980's. Yields have shown much less variation than harvested area during the past decade.

### COTTONSEED

Israeli 1991 cottonseed production is estimated at 35,000 tons, down 58 percent from last year's crop. The area planted to cotton has been declining throughout the 1980's as a result of a combination of lower lint prices and scarce water. The lack of precipitation in the last few years has created a severe water crisis in Israel and led to a drastic reduction of irrigation water. This will reduce the estimated area under cotton in 1991 by 61 percent to 12,000 hectares, down from last year's 31,000.

Yields may remain high despite the drought. Lint quality can be expected to increase if there is no rain during the picking season and because the entire crop is irrigated. A reason for the previous two years of high yields is thought to be the elimination of marginal areas following the sharp area reduction. Robust yields for the 1991 crop may be expected based on this premise but will ultimately depend on how accurately farmers gauge planted area relative to available irrigation water.

The area devoted to Acala and Pima cotton is driven by lint prices and expected yields of these types. Acala cotton is expected to comprise about 65 percent of the 1991 area, similar to the previous growing season. Those farmers not growing cotton in 1991 are likely to shift to sunflower because of its relatively low demand for water and the growing export market. The reduction in cotton area may require further reorganization of ginning facilities.

Cottonseed is the only non-imported oilseed used in the vegetable oil industry. About 75 percent of the cottonseed produced is used for cattle feed. The expected decline in cotton area in 1991 may eliminate the use of domestically grown cottonseed in the vegetable oil industry.

In recent years, the government has had no policy for cotton production. The Ministry of Finance advocated a reduction and even elimination of cotton due to its high water consumption and low world prices during the late 1980's. The Ministry of Agriculture however recommended maintaining an area of about 30,000 hectares but because of scarce water, cotton area is expected to be about a third of the recommended amount.

### PEANUTS

Production of peanuts is estimated at 20,000 tons, unchanged from the previous two years, down 1,000 tons from the 5-year average, and down 10,000 from the bumper crop of 1981. Harvested area has been declining steadily while yields have been increasing during the past decade. The area decline is due to lower profitability and exports. Area for 1991 is expected to be about 3,000 hectares, similar to last year. Yields for last year were good, based on the favorable weather, and similar yields are estimated for the 1991 crop.

Peanuts grown in Israel are for confectionery uses, rather than crushing. They are exported in the shell or processed and incorporated into confectionery products for both local and export consumption.

Though the growing season for peanuts closely follows that of cotton, the water shortage is not expected to affect this crop as severely because it is an export crop and therefore not subject to import crops' 80-percent water reduction. The government has no production policy for peanuts.

#### SUNFLOWERSEED

Israeli sunflower production is estimated at 17,000 metric tons, up 5,000 tons from the previous year and up 7,000 tons from the 5-year average. Production has varied in the past decade, yet there is little difference between the 5- and 10-year production averages. Although harvested area has been declining in the previous 10 years, the 1991 area is 350 percent greater than in 1990 due to the sowing of area that was formerly devoted to cotton and the growing export markets. Yields generally have increased during the past 10 years.

Like peanuts, sunflowerseed grown in Israel is exclusively for the confectionery market. The common variety has low oil content, a large kernel, and was developed specifically for confectionery use. Sunflowers are relatively insensitive to water quality and those grown in Israel are not irrigated.

#### BACKGROUND

In the oilseed industry liberalization of 1988, production and seed import cartels were dissolved and oilseed price controls were removed. Equalization levies were imposed on imported oils and oil meal imports. The latter also were subject to quotas. This was to facilitate reorganization of the oil industry, which many felt was too large and inefficient. The former seven plants have been amalgamated into five crushing operations as a result.

Government production policy has a minimal effect on oilseed production. However, reductions in water allocations in 1991 coupled with the severe depletion of water resources will likely have a major effect on cottonseed. Rapeseed production is under experimentation in Israel but faces the problems of being a short photoperiod crop and sensitive to broad leaf weeds. Because of this and the expansion of sunflowerseed export markets, sunflowerseed is expected to become the substitute crop for cottonseed.

Serious water shortages in Israel have resulted in the decision to sharply reduce water allocation to agriculture and to raise the price of water to farmers. The measures were developed and instituted in early 1991 and are expected to be in force for at least 2 years. Water for import crops (field crops including grains and oilseeds) will be cut 80 percent from last year. Tree crops will receive a 40 percent or greater reduction but greenhouses and field vegetables are exempt. These reductions are in addition to a 10-percent reduction 4 years ago and a 12-percent reduction in 1990. Industrial crops such as cotton will receive only brackish or recycled water, though quantities will not be limited. Water prices have risen 160 percent from last year, and could increase further.

Water quality also is affected. Of the 1.25 billion gallons available for agriculture in 1990, 300 million were brackish. For 1991, almost 500 million of 800 million available will be brackish. The resulting increase in soil salinity will require expensive treatment and continued research to develop saline tolerant crops. The cost of restructuring for some growers could prove to be too high and force those who are already heavily indebted out of business.

Agricultural production is likely to be restructured toward high yielding greenhouse crops. The Ministry of Agriculture expects short-term production of grain, cotton, and fruit crops to fall sharply. New varieties now under development are expected to boost overall production to current levels in approximately 3 years.

---

Jay Kress (202) 475-5142

This article is based on reports by the staff of the USDA agricultural counselor's office, Athens, Greece, and agricultural specialist's office, Tel Aviv.

TABLE 14

**Israeli Oilseeds: Harvested Area, Yield, and Production**

	Area (1000 Ha)	Yield (MT/Ha)	Production (1000 Tons)
<b>Cottonseed</b>			
1981/82	62	2.34	145
1982/83	56	2.73	153
1983/84	57	3.28	187
1984/85	63	2.94	185
1985/86	65	2.46	160
1986/87	46	2.67	123
1987/88	40	2.43	97
1988/89	48	2.17	104
1989/90	30	2.53	76
1990/91	31	2.68	83
1991/92 July	12	2.92	35
1987-91 Average	39	2.48	97
<b>Peanut</b>			
1981/82	7	4.29	30
1982/83	5	4.40	22
1983/84	5	4.40	22
1984/85	5	4.40	22
1985/86	5	4.60	23
1986/87	5	4.60	23
1987/88	5	4.20	21
1988/89	4	4.75	19
1989/90	4	5.00	20
1990/91	3	6.67	20
1991/92 July	3	6.67	20
1987-91 Average	4	4.90	21
<b>Sunflowerseed</b>			
1981/82	8	1.00	8
1982/83	9	1.00	9
1983/84	6	0.83	5
1984/85	5	2.00	10
1985/86	6	1.67	10
1986/87	6	1.50	9
1987/88	6	1.17	7
1988/89	6	1.17	7
1989/90	9	1.89	17
1990/91	4	3.00	12
1991/92 July	14	1.21	17
1987-91 Average	6	1.68	10
<b>Total Oilseeds</b>			
1981/82	77	2.38	183
1982/83	70	2.63	184
1983/84	68	3.15	214
1984/85	73	2.97	217
1985/86	76	2.54	193
1986/87	57	2.72	155
1987/88	51	2.45	125
1988/89	58	2.24	130
1989/90	43	2.63	113
1990/91	38	3.03	115
1991/92 July	29	2.48	72
1987-91 Average	49	2.58	128

July 1991

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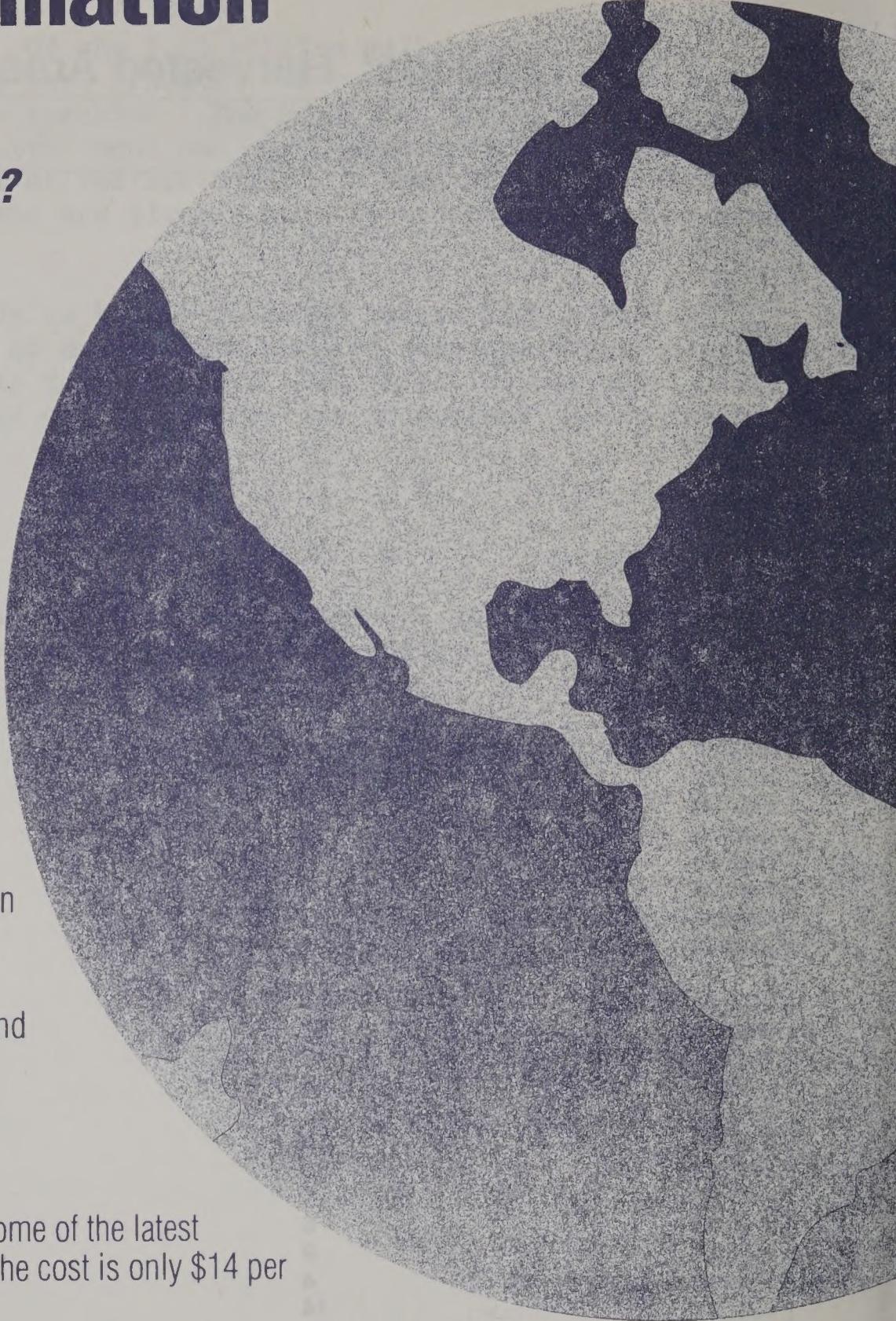
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